University of Alberta

Educating for Prosperity:
An Historical Analysis of Education as the Panacea for Poverty

by

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in

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To my parents, Elvia and Hugolino

Este logro no habría sido posible sin ustedes. Mi más profundo respeto, admiración, cariño y reconocimiento por su labor de padres y maestros. ¡Gracias por su ejemplo, amor y apoyo!

Abstract

Policy emphasis on education as a medium to alleviate poverty and to achieve development is this thesis's topic. Long enforcement of this approach has led us not only to believe in the education-for-prosperity link, but also to reproduce it and create a social system that works in line with it. This study explored this approach as conceived by key international financial institutions—the World Bank and the Inter-American Development Bank—and by a specific nation-state—Mexico.

An historical analysis was conducted of 29 documents from 1960, when these banks first became involved in policy making and funding of education projects worldwide, to the present time. They were chosen because of their relevance in effecting concrete practices in the education sector. A constructivist grounded theory approach was used to read, analyze, and identify relevant categories within them. A content analysis methodology was also used to study the treatment of the concepts of education and poverty over time by the two banks and Mexico.

This study contributes to a deeper understanding of how educational policies came to be. The study of the banks revealed that the link between education and poverty occurred at the end of the 1980s. This link was strengthened by a shift of focus from the nation to the individual, which facilitated the education-for-poverty objectives. The study of Mexico suggests that

international policies influenced national education policies; Mexico adopted the same perspective during the 1990s, a decade later than the banks.

Despite the strength and acceptance of education for prosperity, it is still a social construct of our creation and reproduction. The key recommendations are (a) to develop further understanding and appreciation of the noneconomic side of education; (b) to distance education from economic and neoliberal principles that belittle its humanistic side; (c) to consider that education, our way of conceiving it, and our practice is a social construct that can be challenged and changed; and (d) to seek a type of education that truly fosters equity and equality.

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CHAPTER 1:

INTRODUCTION

Historically, education has served different purposes, and different roles have been attributed to it. It has been perceived as an instrument to transfer knowledge from one generation to another to preserve generational understanding and the necessary knowledge for survival (Murphy, 2006); it has been viewed as a medium of emancipation and as a medium to help individuals develop their full potential (Freire, 1970; Murphy, 2006, p. 237). It also has had roles as instruments of domination, civilization, conversion (Comaroff & Comaroff, 1991; Murphy, 2006, p. 14), classification, exclusion, inclusion, imposition of ideas, regulations, and discipline (Bourdieu, 1998, p. 22; Foucault, 1984a, p. 133; Foucault, 1996a, p. 136; Fuller, 2003; Wolf, 2004, p. 29), economic development, prosperity, and accumulation (Becker, 1993; Wolf, 2002; World Bank [WB], 2005c). It is these final three—economic development, prosperity, and accumulation—that I examine in this current work.

The latter three perspectives view education as the panacea for the economic problems of nations and individuals. Certainly influential international organizations such as the WB and the Inter-American Development Bank (IDB) perceive education in this way and prescribe it as a method for countries not only to achieve economic growth, but also to eliminate poverty. This can be seen by simply browsing the Banks' Web page; the following quotation is a good example of this perspective: "Education is central to development and a key to attaining the Millennium Development Goals. It is one of the most powerful instrument for reducing poverty and inequality and lays a foundation for sustained growth" (WB, 2009c).

Education is seen as the solution to many of humanity's social, cultural, and health problems (e.g., HIV/AIDS, fertility rates, environmental, and others) and, increasingly, to economic problems as well. For many, to question the economic potential of education is unthinkable. This is serious when we consider that significant amounts of resources are devoted to creating societies of educated people with the expectation that this will improve the economies of individuals and nations. This approach has raised the value of education, but it has simultaneously generated pernicious consequences such as credential inflation and the false belief that it contributes to the redistribution of social class (Bourdieu, 1998, p. 19; Taylor, 2001, p. 180).

Throughout this thesis I will present an historical analysis of the development of the notion of education for prosperity over time in policy documents. By dividing this research into two studies—one with an international and the other with a national scope—I hope to be able to shed some light on how ideas are made into policies and subsequently diffused. I will also provide a wider picture of how the notion of education for prosperity was developed at the macro and micro levels. The overall objective of this thesis was to discover how the notions of education for prosperity evolved over time in Latin America and Mexico.

In the first study I examine whether and how the notions of education have changed over time to foster an understanding of when they became linked with the notions of poverty and to report when the idea of education for prosperity was first addressed in policy documents. With this objective in mind, I have set up two institutional fields: the WB and the IDB. I selected key documents for my search: reports or publications and project appraisal documents (PADs) or loan agreements; and I delimited the search to a particular period of time: from the 1960s to the present and to a specific region: Latin America.

In the second study I also analyze the trajectory of the discourses on education, education for prosperity, and poverty, but with a special focus on the context of Mexico, which will help me to discuss whether the national approach follows the same policy development as the international, and I compare the international and the national approach with regard to the same issue. The second study is limited to an understanding of the trajectory of the notions of education in Mexican policy documents: National Programs of Education (revised and published every presidential term) from the 1960s to the present.

The research questions for the two studies include the following:

1. Since the 1960s, how have the WB, the IDB, and Mexico approached the notions of education and poverty?
2. How and when did the notions of education become linked with the notions of poverty in the education policy documents of the WB, the IDB, and Mexico?

3. Have these links changed over time?
4. Do the international and national approaches to education for prosperity concur?

Methodology

This section is divided into seven parts; I begin by outlining the research paradigm, my role as a researcher, and the research design; and then I explain the data analysis procedures, the delimitations, the limitations, and the trustworthiness of the study.

Research Paradigm

In this research I aimed to explain how the notions of development and education for prosperity have evolved over time in Latin America and in Mexico; I therefore conducted it with a qualitative historical analysis approach based on textual sources (Richards, 2005, p. 23). The methodological characteristics of this research and the findings were influenced by my ontology—guided by my ways of thinking and feeling about the world—and by my epistemology—based on my ethical and moral stance toward the world and toward myself as a researcher (Denzin & Lincoln, 2005).

By selecting an historical methodology framework, I focused on gaining an understanding of the basic underlying forces that led to the most recent definition of education. This historical analysis traced the current notions of education back and analyzed how they came to be. In the analysis I attempted to gain an understanding of how education has been conceived chronologically

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(Richards, 2005, p. 23) and to capture how and when policies of education for prosperity were taken up at definite point in time. This historical analysis was based on a Foucauldian discourse analysis in which I took into consideration how historical and cultural circumstances, events, and players with power and/or knowledge within the field construct and validate knowledge (Gubrium & Holstein, 2003).

My Role as a Researcher: My Ontology and Epistemology

In thinking about myself as an ontological and epistemological being, I can identify what I believe are important personal characteristics that influence my perspective of reality and the way that I construct knowledge. I want to begin by pointing out that I grew up in Mexico and attended Mexican educational institutions from kindergarten to university. I have been residing in Canada since 2001, and my time and experiences in both locations have made me familiar with the system in Mexico and the capacity to look at it from outside.

Only a few years after my arrival in Canada I was positioned in a space of "in-betweenness" that can be defined as a feeling of not belonging to the Mexican culture, nor wholly belonging to the Canadian one. Octavio Paz (1993), in his analysis of Mexican immigrants in the United Sates, explored this state of oscillation between two worlds and pointed out the struggles with identifying with one culture that this group has faced. This sense of not blending is constantly brought to mind when I am asked where I am from, both in Canada and in Mexico. My accent, my clothes, my selection of words, my syntax, my mental structures evident in my ways of thinking and interpreting the world are all imprinted by my exposure to the two cultures; they make me a foreigner-local in those two countries, and they influence the way I see and build knowledge.

Another personal characteristic that has influenced the way I interpret knowledge is the fact that, as a daughter of teachers with a dissident political posture, I have been led to take a side in educational politics since an early age. I grew up with parents who hold high the perception of public pedagogy and understand education as a process that occurs inside and outside the school. In their words, "*el maestro luchando también esta enseñando*," which means that a teacher fighting for social justice and participating in strikes and public acts of resistance to the hegemonic powers is a teacher teaching. This influenced my selection of a career in the education field and my interest in populations who are less privileged not only because they have been robbed of the right to education, but also because their society does not value their non- academic expertise and contributions. Farmers are part of this group, and I want to talk about them because of the influence that a farming background has also had on me.

I think of farmers because my teacher parents saw the struggles of migrant farm families looking for better opportunities in the cities and actively participated in helping them. I also think of farmers because my grandfather (who participated in the Zapatista agrarian movement that led to the Mexican revolution), my father, and now my twin brother have all devoted themselves to the land. In these three generations, and in other farmers with whom I am acquainted, I have seen the same discrepancies. One of them is that whereas the land feeds us (urban dwellers), it impoverishes them (rural dwellers). It is not so much the land as it is the system, a system that has become overreliant on credentials, a system that assumes that the major contributors to society are those who hold higher diplomas and those who have spent the longest time in educational institutions. This system that does not value empirical knowledge and that has reduced its perspective of education to monetary terms is the system that I want to question.

Crucial players in this system are the banks that I studied. It is important to mention that my ontology also influenced the way that I read and interpreted their policies, because, through experience and through a few research collaborations on the influence of international organizations in national systems, I have been exposed to the pervasive effects of their policies. In some of these studies we discovered that while international support for impoverished areas is support that they otherwise would not have received, it has also led to practices of imperialism and has set structures of dependence and subjugation (Ocampo & Neu, 2008, Neu, Leiser, & Ocampo Gomez, 2008). In our analyses of international organizations such as the WB, we saw that they are able to validate their projects by using sequential and often circular activities such as (a) representing themselves as experts in the field, with an extensive knowledge base, with the resources to fund needy areas, and with the willingness to be socially responsible actors (Ocampo & Neu, 2008 p. 16); (b) addressing 'hot topics' such as HIV/AIDS, biodiversity, education, and health; (c) offering loans that fund areas such as poverty alleviation that help governments to look socially responsible; and (d) not always tracing international investments back to the banks and letting people think that it was a good or a bad national policy rather than the act of national leaders who are only following instructions from an external, unelected actor. These last methods refer in part to how the banks' relationships with the governments work. Banks benefit by investing funds in reliable areas, whereas nations benefit by having access to resources that will help boost their economic and social development.

In reflecting, I found it interesting that the only woman who has been able to study at the doctorate level in my family and who has spent more years in educational institutions than anyone else has decided to question education. It was complicated in the initial conversations with my parents to justify my research questions. The major complication resided in the fact that they still see education in the same sense that Freire (1970) would see it: as a space of liberation, growth, fulfillment, and utility for the individual's human aspirations. This is not the type of education that I question. Rather, it is the type that is justified and based on the economic, the perspective that views education as capital and that attributes economic value to formally educated individuals.

I decided to pursue a thesis to question the very essence of education, influenced in part by my upbringing in a family of teachers, but also by my experience as a teacher of marginal groups. Before I came to Canada I worked in two different public junior high schools that catered to children of industry workers and migrant farmers. I was only in my early 20s, and my experience as a teacher was reduced to four years, but those years were sufficient to leave me wondering why it was that such impoverished families who at times could not afford to eat would send their children to school. In informal conversations with them and their children, I often heard the same argument: "Without education, you are nobody." The exact meaning of being somebody or nobody in the context of their arguments requires further research, but according to my experience in working and living in the same context with them, and according to my subsequent training and education in policy analysis, they were referring to a system that nullifies individuals without education. Reflecting on this, I became interested in this system and in the ideologies that attribute the value of being or not being to individuals.

In acknowledging my ontology and epistemology, I agree with Kincheloe and McLaren (2005) that this qualitative research is imprinted with my own stories, experiences, dilemmas, assumptions, and questions. My personal background and experiences add a unique interpretation to my research. They say, "Because all observers view an object of inquiry from their own vantage points in the web of reality, no portrait of social phenomenon is ever exactly the same as another" (p. 319).

The Research Design: Selecting and Accessing Documents

To conduct this historical analysis and address the research questions, I selected a set of three key documents from the two banks and the Mexican government. The first documents are called *project appraisal documents* (PADs) for the WB and *project documents* (PDs) for the IDB; the second set includes the banks' publications on the theme of education; and the third is *Programas Nationales de Educación* (National Programs of Education [NPEs]) for Mexico. Table 1 displays the three types of documents and explains the characteristics of each.

Table 1

Three Types of Documents and Their Characteristics

WB and IDB: PADs and PDs	WB and IDB: publications and reports	Mexican government: NPEs
Also known as loan agreements. They are legal documents wherein the banks explain the financial details of the loan and the characteristics of a project that has received funding. They also provide contextual information on the country and its educational system, the objectives, the performance indicators, the justification for the project, and their perspective on education and other sectors that they consider important.	Both banks issue one or two publications every decade that serves as a report or a diagnosis of all areas in which they work, including education. The documents included here focus on education. These reports often compare the educational systems of different parts of the world.	NPEs are designed by the Ministry of Education and change every six years with the presidential term. They describe the educational objectives of the government at the time, the mission and vision for education, and the type of citizen whom education attempts to shape.

I strategically selected these texts to help me discern how education was defined during the decades in question. Because of the abundance of PADs/PDs, publications, and NPEs, I drew a purposive sample based on criteria of relevance, comparability, and accessibility (Berg, 2001, p. 32; Richards, 2005, p. 41): (a) relevance, because I tried to include documents that would describe the theme that I was exploring and that would help me to conduct a more focused and delimited analysis; (b) comparability, because I sought to include documents that enhanced the possibility of a comparative analysis; for example, PADs/PDs that contained loan terms and descriptions of countries with similar economic, social, and political characteristics and with projects funded within the same area of elementary and secondary education and with similar amounts of loans; and (c) accessibility, which was influenced by the reduced access to documents, especially from the earliest decades (Denzin & Lincoln, 2005, p. 378).

The sample from the banks included two loan projects and a report/publication each decade, each concerning elementary or secondary education. The sample from the Mexican documents included an NPE each presidential term commencing in the 1970s. Tables 2 and 3 display the titles of the documents published each decade and each presidential term.

The procedure for accessing the documents from the WB and the IDB led me initially to consider their Web pages and determine the availability of online education projects that they had funded. The WB's Web site contains a list of the projects that the bank has funded or co-funded since its creation. The list has key

Table 2

List of PADs/PDs and Publications From the WB and the IDB

	1960-1969	1970-1979	1980-1989	1990-1999	2000-2009	Total
WB Reports/ publications	No relevant publications for education during this decade	Attacking rural poverty (1975) 10091 Topic: Ed	Education and Development (1983) 33245 Topic: Ed	Decentralization of Education: community financing Vol. 1 (1996) 16167	Achieving Universal Primary Education by 2015: A chance for every child (2003)	4
IDB Reports/ publications	No publications for education other than for higher education during this decade.	Financiamiento de la Educación en América Latina (1976)	Seminario sobre Alternativas de Programas y Proyectos Orientados a las Nuevas Prioridades Educacionales en América Latina (1980)	Education as a Catalyst of Progress (1998)	MDGs in LA and IDB support (2005)	
WB loan projects to education	Colombia (1968) Education Project El Salvador (1969) Education Project	Paraguay (1972) Education Project Honduras (1978) Education Project	Guatemala (1983) Education Project (2) Peru (1984) Primary Education Project (2)	Argentina (1998) Third Secondary Education Project Uruguay (1998) Second Basic Education Project	Mexico(2005) School Based Management project Brazil (2004) Pernambuco integrated development: education quality improvement project	10
IDB loan projects to education	No available documents for projects during this decade	No available documents for projects during this decade	Brazil (1989) Educational assistance for low-income population	Panama (1997) Education Development Project Argentina (1994) Education Reform and investment program	Honduras (2000). National Education Reform Program Mexico (2005) Oportunidades Fase 2	5
						23

Table 3

NPEs for Education in Mexico

1960-1970	1970-1976 President: Luis Echeverria Alvarez	1976-1982 President: José López Portillo	1982-1994 President: Miguel de la Madrid Hurtado	1988-1994 President: Carlos Salinas de Gortari	1994-2000 President: Ernesto Zedillo Ponce	2000-2006 President: Vicente Fox Quesada	Total
No documents available	(1974) *Echeverria y su pensamiento educativo* (Echeverria and his educational thoughts)	(1976) *Educación para el cambio.* (Education for Change)	(1984) *Educacion, cultura, recreación y deporte.* (Education, culture, recreation and sports)	(1989) *Modernizació Educativa.* (Educational Modernity)	(1995) *Programa Nacional de Educacion* (National Program of Education)	(2001) *Programa Nacional de Educación* (National Program of Education)	6 NPEs

classificatory information for each one and a link to the PDF file of the PAD. I selected two for elementary or secondary education[1] from the available projects for each decade. Both banks closed several of the oldest PAD files, and I could not access them online. After a series of e-mails and bureaucratic procedures that lasted several weeks, the WB archivist granted me access.

Obtaining PDs from the IDB presented a different challenge. The IDB archivist informed me that the documents from the 1960s, 1970s, and 1980s that I was requesting had already been destroyed. She suggested that I re-create my sample and seek only the loan agreements for larger amounts[2] and that I contact the particular country's officials, who might have saved a copy in their archives.

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[1] I combined these two levels because, in classifying the projects for education, the IDB has combined primary and secondary education.

[2] The archivist argued that the amount would make the loan agreements more relevant and would ensure that there were historical records of them.

After seven months of unsuccessful attempts to obtain the documents through different methods, I decided to work with the documents that were available on the Internet and from some countries' officials.

Accessing NPEs was also an arduous task, especially for programs from the 1960s and 1970s. In person and with the help of friends who were residing in Mexico City, I visited national archives to find the NPEs from the 1960s to the present time. I was able to track NPEs from the 1970s through the *OCLC World Cat* database available at the University of Alberta library. NPEs from the 1960s or older were available only in the Secretary of Education archives, but I could not access them because the offices were relocating during the time of my data collection and analysis.

Data Analysis

Once I had collected all of the documents, I used a constructivist grounded theory approach (Charmaz, 2003) to read and analyze them. Kathy Charmaz described three qualities of this approach:

> (a) Grounded theory strategies need not be rigid or prescriptive; (b) a focus on meaning while using grounded theory *furthers*, rather than limits, interpretive understanding; and (c) we can adopt grounded theory strategies without embracing the positivist leanings of earlier proponents of grounded theory. (p. 251)

Based on this constructivist grounded theory strategy for data analysis, I skimmed the documents, and they gave me a general idea of how the documents were organized, the themes presented, and education problematized, as well as of any recurrent themes. During this stage I analyzed the differences among the documents, the differences as time progressed, the themes that each addressed, and the relationships among outstanding concepts (Charmaz, 2003). I took notes in the margins and stored and classified them digitally. I also identified a series of categories related to the theme of this research. Following this, I read each document in its entirety and identified each instance in which those categories were used. I also used a set of broader categories: the mentalities, the programs, and the technologies of each document. These emerged, not from the texts, but from my theoretical framework. The section Analytical Tools in the literature review chapter explains how the mentalities, techniques, and programs of government are understood.

After identifying the categories, I proceeded to use a content analysis (Berg, 2001, p. 240) methodology to read them and to study the treatment of each concept over time and across the two banks. I revisited the selected themes and sometimes larger sections of each document several times to ensure that I had understood and interpreted them fairly (Richards, 2005, p. 80). To avoid losing or forgetting information, I wrote a summarizing report about each document immediately after I finished my analysis of it and stored an electronic copy. Besides looking at these official documents from the banks' and Mexican perspective, I studied vast amounts of historical information to help me describe the contextual forces that played a role in the policies of the time and to enhance my Foucauldian methodological and theoretical research approach (Gubrium & Holstein, 2003)

As I organized and wrote the findings, I divided my written report into decades and used the most predominant themes to define the character of that time. The division does not suggest that what is classified and discussed within each division is "clear cut", but instead suggests that those themes emerged and were of particular importance to the politics of that period. I recognize that the themes for each decade overlap with anterior or posterior decades, but in the interests of policy analysis and textual continuity and order, I examined them in the aforementioned manner.

Delimitations

Kjell Rudestam and Rae Newton (2001) reported that the research delimitations include the focus of the study, what is included and excluded, the restrictions of the populations being studied, and the extent to which the results are generalizable. This study was delimited to the history and evolution of the policies for education within two institutions and one country: the WB, the IDB, and the government in Mexico. In the case of the banks I delimited the research to their operations in Latin America and set up a timeline from the 1960s to 2005, but as I explain in the limitations, I was unable to find primary sources from the 1960s. This lack of sources for the 1960s limited the scope and comparability of my research for this decade.

Limitations

The research limitations, according to Kjell Rudestam and Rae Newton (2001), refer to the restrictions of the study—what the researcher, with his or her resources and research design, is able to produce. The first limitation of this study was my inability to access documents from the 1960s, which limited the scope of my genealogical analysis to later decades and caused me to restructure my original design by including only more recent PADs/PDs and NPEs. However, I do not think that this limitation was significant enough to have restrained me in conducting a thorough historical analysis.

The second limitation resides in the nature of the data collected: Using documents as my sources of data prevented me from exchanging ideas with the authors and asking questions to verify the accuracy of my interpretations. However, this did not limit the validity of my analysis because I regularly examined my own biases. An important bias pertaining to the two studies that I discovered while I wrote the conclusions and that I had to address was that my design assumed a gradual increased reliance of the banks and the country on economic principles to design their educational policies. I therefore had to write my conclusions twice: The first conclusions matched my biases, whereas the second conclusions better matched my data. When I wrote the second conclusions, I realized that, in fact, the banks have since the beginning pushed for an economic perspective on education and that only the country had gradually adopted economic principles in its educational policies. Further details on the validity and trustworthiness of this research follow.

A third limitation resides in the lack of a micro-localized perspective. It would have been interesting and enriching to determine how policies are taken up and implemented not only at international and national levels, but also at a local level, configured by the subjects who are directly affected by the policy. This perspective would have allowed me to examine the effects of the policies and generate enough information to assess their benefits and enrich my recommendations.

Trustworthiness and Authenticity

Trustworthiness attests to the true value of the findings, which either the participants in a study or, in this case, the authors of the documents that I analyzed can affirm as true (Lincoln & Guba, 1985). I reaffirmed the trustworthiness of the texts' authority by taking a series of validity steps—credibility, transferability, and triangulation—to judge them.

Credibility, or the establishment of confidence in the truth value of the inquiry and the findings, is conditional on how the research is conducted and in the steps that are taken to ensure that the interpretations are based primarily on the data. In this research I employed a series of techniques while reading, interpreting, and reporting my findings. Some of these techniques included (a) using a broad research design, (b) selecting primary documents, (c) conducting peer debriefings, (d) disengaging from the research, and (e) having discussions with qualified researchers.

The broad research design, especially at the macro level, consisted of the inclusion of more than one document per decade and of an examination of more than one bank and their approaches to different educational settings. Although this increased the complexity of the analysis, it gave it "paralogical and rhizomatic validity" (Olsen, 2005, p. 252), which means that I validated the authority of each text through multiple sites. Even though I was unable to do the same at the micro level, including historical documents worked similarly. Selecting primary documents also strengthened the credibility and validity of this research. A great deal of research described the perspectives of these banks on education, but I used the primary sources, the actual loan agreements and publications, to ensure the accuracy of the information and an unmediated perspective on their policies. For the peer debriefings I sought opportunities to present my results and interpretations at research conferences. There, peers from the fields of education and accounting raised questions and themes that I had not thought about, helped me to see alternative sides to my interpretations, and questioned my taken-for-granted ideas. The research disengagement consisted on my stepping away from the data-analysis tasks for periods of time to read articles in favour of or in opposition to the direction that the thesis was taking. My discussions with my supervisor and with other faculty provided a space for reflection and critical analysis of the findings and interpretations. It was in discussions like this that I was persuaded to broaden the scope of the analysis by including as many documents for each decade as I could.

Transferability, another step that strengthens the validity of the research, refers to the degree to which particular findings of the study are applicable in other contexts. In this case, it is important to point out that I was examining two international banks and a national government and their treatment of the notion of education for prosperity. Their perspectives were delimited to a micro and macro context that included Mexico as a nation and Latin America as a region, respectively. I took a few steps to assure the transferability of my results to other countries and regions, one of which was my consideration of the historical circumstances that influenced the country's and the banks' approaches to education. Given my articulation of the social, cultural, and economic events worldwide, I do not doubt that these external influences extend to how other countries, other regions, and even other international organizations are presenting education for prosperity. In fact, my literature review reveals coinciding perspectives on the banks, especially the WB, whose work and predominantly economic approach to education are not delimited to the Latin American region.

Methodology experts advocate *triangulation*, which, in the collection of data through interviews, consists of asking the interviewees to verify the accuracy of the researcher's interpretations. Given the nature of this research, which is based on document analysis, I was unable to return to the author of each document to ask his or her opinion of my interpretation and therefore had to employ other techniques. Instead, I used a technique called *overlap methods* (Denzin & Lincoln, 2005), whereby I examined more than one document for the same period of time and more than one bank. Thus the macro section of the study included 4 documents per decade, which totalled 23 documents over the course of five decades. The micro analysis involved only 6 documents, but as I mentioned above, all were enriched with historical information.

Relevance of the Two Studies

This research is important because the notion of education for prosperity as a primary objective of the school system has changed not only the pedagogical approach (by converting education into an economic tool), but also the social values traditionally attributed to education. These two changes, highly problematized to date, need to be understood from their roots. Exploring the roots helps to explain how these policies came to be and identify how they are grounded, how they have grown, how they have spread, and what type of "tree(s)" they are sustaining. I believe that looking at the past will help us to better understand and approach the future.

This study contributes to a deeper understanding of how educational policies came to be. Not only does it explain the influence of economic players in the field of education, but it also examines how those players gain entrance and legitimacy across fields. Likewise, it examines the relationship between international and national policies and provides a broad discussion on how each influences the other.

Another feature that adds to the relevance of this research is the comprehensive discussion on education as a tool to combat poverty and the consideration of this approach as a social construct. Therefore, the research examined some of the hegemonic forces, often overlooked, that sustain this approach.

Last, this research is important because it inquires into one of the most challenging social phenomena—poverty—and one of the most widely accepted solutions to it—education. We live in a time when poverty has become more complex than ever before. This is because it results not only from local, but also from global causes and because players from varied places are involved in explaining it and in deciding how to "solve" it. This has meant that individuals no longer have direct control over their economic condition; nor do they have autonomy in defining its meaning and proposing solutions to it. We are also in a time when education—its meaning, aims, and goals—has expanded to meet the economic agendas of external players who are often foreign to the field and to educational institutions' population. Henri Marrou (1982) defined education as a technique that encompasses the values of a civilization:

> Education is a collective technique which a society employs to instruct its youth in the values and accomplishments of the civilization within which it exists. It is therefore a secondary activity, subordinate to the life of the civilization of which it forms a part, and normally appearing as its epitome. (p. xiii)

As I demonstrate throughout this thesis, the values of our civilization have been influenced by powerful, oftentimes foreign (to the field) players such as the banks. Their role in defining education and the techniques and methods to achieve it need to be closely examined. This thesis is a critical reflection of these themes in a historical context and delimited to two of these important players in the production of knowledge on poverty and education: the WB and the IDB.

CHAPTER 2:

LITERATURE REVIEW AND THEORY

This review is organized into two major sections: one addresses the conceptual framework of the research and includes themes such as education, poverty, human capital, and globalization; the other addresses the theoretical framework, including a discussion of theories such as discourse analysis, genealogy, Foucault's approach to history, Nietzsche's approach to genealogy, and Bourdieu's approach to capital, field, and habitus. I present both sections in an effort to contextualize and make sense of the themes that I address in this research, and they guided my data collection, analysis, and synthesis.

Education: Varied Ways to Understand It, Varied Ways to Practice It

Education is the central theme of this thesis; thus, it is important to define it, to discuss what is said about it, and to explain how its current definition shapes our world. Since antiquity, education has traditionally been associated with the process of instructing children or young people, as historian Henri Marrou (1982) explained in his study of Greek education:

> It would be a false impression of oriental education to depict it as being strictly confined to technical and utilitarian instruction. The training of the scribe aimed higher: it professed to achieve a complete formation of mind and character and to lead to what can only be called Wisdom. (p. xvi)

Other historians who specialized in ancient cultures (e.g., Indian, Western, Greek) argued that education has neither been reserved for educational institutions, nor, in agreement with Marrou (1982), necessarily linked to utilitarian activities (Bowen, 2003; Sharfe, 2002; Watts, 2006). Only more recently has education been associated with schooling, development, and productivity. This process is controlled by the school institution and in most cases delimited to it. Furthermore, it has become a process with lifelong continuity in which all individuals, regardless of age or experience and who want to improve their social and economical status and their opportunities for better employments, should partake.

The current perspective on education as schooling shows that the terms have been used interchangeably, as if they mean the same thing, in the policy documents of the two banks under analysis (Bruns, Mingat, & Rakotomalala, 2003; IDB, 2007a) and of governments and different ministries of education throughout the world, in academic documents on education (Bachalet, 2007; Chávez Frías, 2005; Fox Quezada, 2005), and even in the quotidian conversations of individuals who want to be "better educated" to be able to have more opportunities. The following section departs from the perspective on education as an institutionalized process to acquire knowledge and the certificates to prove this acquisition and describes several issues that various academics in this field of study have identified.

There is a growing concern that education, instead of serving as an opportunity equalizer, serves as the means to rank, classify, and dispose of individuals in a seemingly 'democratic' way. For example, in her studies on the myths of education and economic growth, Alison Wolf (2002) pointed out, "Education today is a socially acceptable way of ranking people which most employers would find hard to do without" (p. 29). Steve Fuller (2003) also presented some of his worries about education: "Contrary to the name 'knowledge society,' knowledge functions more as a principle of social stratification or a source of capital development, but not a form of inquiry" (p. 106). Also, Pierre Bourdieu (1998) talked about the "new capital" (p. 22) and referred to schools as institutions that reproduce social spaces and capitals:

> The school institution once thought capable of introducing a form of meritocracy by privileging individual aptitudes over hereditary privileges, actually tends to establish, thorough the hidden linkage between scholastic aptitude and cultural heritage, a veritable *state nobility*, whose authority and legitimacy are guaranteed by the academic title. (p. 22)

There is also a common critique of the benefits of education and the population that it impacts. Although financial institutions and governments proclaim that educated individuals in general have better, more numerous occupational options, in practice, education is often only one of several factors that contribute to an individual's prosperity. It is often not just about obtaining a degree, but also about obtaining it from the right institution, at the right level, in the right field, and with the right connections in the labour market. Alison Wolf (2002) wrote, "When everyone, or almost everyone, has a degree, employers will obviously become more and more picky about the type of degree they want, and, justifiably or not, will create new dividing lines: right subject, right results, right institution" (p. 185). In a discussion on the same theme, Bourdieu (1998) contended that

> whatever an official meritocratic ideology may want people to believe, not all the differences in opportunities for appropriating scarce goods and services can reasonably be related to differences in possession of cultural and educational capital. It is thus necessary to hypothesize another principle of differentiation, another kind of capital, the unequal distribution of which is the source of the observable differences in patterns of consumption and lifestyles. I am thinking here of what could be called political capital. . . . When other forms of accumulation are more or less completely controlled, political capital becomes the primordial principle of differentiation, and the members of the political "nomenklatura" have hardly any competitors. (p. 16)

Another issue is the increasingly utilitarian perspective on education. With education an important determinant in entering the labour market and more people attending school to obtain a diploma, the knowledge and training that go with it become secondary. Oftentimes the diploma serves as only a document to validate what the person already knows or could learn in a less formal manner and becomes an artificial but valid symbol of knowledge. That is, some professionals attend school to validate their knowledge for their employers. Fuller (2003) referred to "those who seek university degrees mainly to get credit for knowledge they have already come to possess by virtue of job or other life experience" (p. 110). This quest to participate in the game of a meritocratic system in which 'credentials' make a difference in people's lives is just raising the bar of competition because, with more people who have higher levels of education, employers will look for even higher levels to sustain the democracy of the process. Consequently, by raising the level of competition, the resources invested in obtaining a degree are so high that arguments in favour of education as a tool to reach equity become misleading. Robertson (2005) listed other effects of the pursuit of human capital:

> Some of the key outcomes of the focus on human capital formation in national economies have been a significant increase in the overall levels of participation in higher education, in funding to the education sector more generally around technological and research and development infrastructures, together with a raft of policies that are oriented towards generating a more competitive environment and entrepreneurial individual within the context of lifelong learning. (p. 152)

Foucault (1996a) likewise added to the list of consequences for the interpretation of this utilitarian perspective on education:

> The degree simply serves to create a kind of market value for knowledge, to make those who don't have degrees feel they have no right to knowledge, are not capable of knowledge. Everyone who gets a degree knows perfectly well it's useless, it has no content, it's empty. But those who don't have degrees are the ones who set great store by them. Degrees are precisely for those that don't have them. (p. 136)

These authors' analyses show that education not only has been transformed, but is also transforming society by producing a series of effects that need careful consideration. One of these effects, known as credential inflation, degree inflation, or the so-called diploma disease, has changed the way that education is being perceived and people's drive to enter school. In this research I addressed the need to understand the source of these ideas, the principles that found them, the forces that foment them, and whither they are taking us. I hope that this analytical approach will aid policy-making procedures for education.

Poverty: Varied Ways to Understand It, Varied Ways to "Solve" It

Indicators, Measuring Tools, and Approaches

Poverty, one of the most discussed concepts of our time, is commonly understood as a restrained economic condition that prevents affected individuals from accessing commodities that are essential for survival. More recently, however, scholars specialized in this theme have proclaimed that poverty has become multilayered and multidimensional, which makes its understanding more complex (Beaudoin, 2007; Sachs, 2005; St. Clair, 2006; Steger, 2002). Steven Beaudoin, for example, posited that the definition of poverty should also include individuals affected by the cultural dimensions of poverty (p. 4). He thus presented a threefold classification of people who live in poverty: the destitute, the structural, and the conjunctural:

> The "destitute" lack the capacity to survive without assistance; their insecurity is total. . . . The "structural" poor comprises those who have the ability to meet their own needs, be it survival or active engagement in society, but not the means. . . . The "conjunctural" poor, the third group, consists of those who are capable of meeting their own needs because of their access to resources, but who remain vulnerable because they cannot insulate themselves from misfortune. (p. 10)

It is clear at first glance that Beaudoin's definition of poverty is broader than the aforementioned description of poverty as an economic limitation. His definition takes into consideration not only the insufficiency of economic resources, but also the lack of other resources that are necessary for active participation in the economy:

> Poverty is thus much more than just a dearth of material goods. It is the inability to participate actively in life, from attaining the educational levels that optimize career choices, to acquiring both time and income to engage in various common leisure activities. It is also the absence of political freedom, personal security, dignity, and self-respect. It is these intangibles in particular that give this definition a culturally determined characteristic. (p. 6)

Beaudoin further explained that in the current era, poverty is often the result of external causes such as global political and economic practices and not necessarily immediate factors as in yore:

> Before 1500 poverty resulted principally from local sources like natural disaster, warfare, and civilization-specific systems of distribution; few were affected by what were still regional trade networks. At the same time, most cultures viewed impoverishment as a natural part of life, rarely defined as the absence of material possessions. (p. 12)

The WB's (2006a) definition of poverty targets groups within the destitute category (using Beaudoin's words) and provides a perspective of poverty that results from local rather than global factors:

> Poverty is hunger. Poverty is lack of shelter. Poverty is being sick and not being able to see a doctor. Poverty is not having access to school and not knowing how to read. Poverty is not having a job, is fear for the future, living one day at a time. Poverty is losing a child to illness brought about by unclean water. Poverty is powerlessness, lack of representation and freedom.

Similarly, the IDB (as cited in Morley, 1997) defined poverty as

> a lack of access to or command over the basic requirements for a minimally acceptable standard of living. That is, a person is poor if he or she has insufficient food or a lack of access to some combination of basic education, adequate health services, clean water, safe sanitation systems and even a safe area in which to live. (p. 1)

Although most definitions of poverty are alike, the methods used to measure it and determine its causes, its levels and types, whether someone is poor or not, whether poverty has augmented or diminished differ. As can be seen in the previous examples, the banks' definitions of poverty are considerably narrower in scope than is Beaudoin's (2007) definition.

Producing Knowledge About Poverty

Institutions such as the WB and the IDB have had a remarkable role in the development of measurements to assess poverty and to decide which mechanisms are necessary to solve it. St. Clair (2006) pointed out that "knowledge for the development and the eradication of global poverty is primarily in the hands of a transnational expert institution, the World Bank" (p. 57). I agree with St. Clair but see not only the WB, but also other international organizations (e.g., OECD, UN) and banks (e.g., IDB, IMF) as influential players in the management and production of knowledge on poverty.

The WB, however, has been the most influential of them all. Its influence resides in three main factors. First, the international scope of its operations, compared to the IDB's regional scope, affords the WB worldwide influence. Second, its financial capacity to fund projects, compared to the strictly technical and pedagogical capacity of organizations such as the OECD or UN, enhances its influence in the control of wider areas of countries' policies. And third, its broad base of expertise in knowledge for development has, until recently, legitimized its technical advice and enhanced countries' willingness to adopt its recommendations.

In 2004 the WB's mandate and goal were poverty eradication. This lofty platitudinal goal transcends its activities and appeared in all of its operations and fields of work, well beyond the limited scope of education (WB, 2004a). Thus, any work in the other areas that the WB funds is oriented toward reinforcing the poverty eradication goals. Although considerable effort, at least discursively, has been put into achieving this goal, many have criticized the WB and other banks and transnational organizations for failing and—worse yet—for using their ideas on development and their knowledge about poverty as tools to reproduce North American capitalist hegemonic practices (St. Clair, 2006; Steger, 2002).

Other areas in which international players have been criticized for their involvement in developmental policies point to how some have distorted the reality of national and regional situations to privilege economic quantitative values over human values:

> Global poverty is highly contested and politicized. It is an ill-structured and complex social problem able to be defined in different ways, the problem space changing with time and location, and the casual arguments being slippery and difficult to establish. Poverty definitions and assessments are not accounts of facts, but rather 'fact-surrogates,' well-structured parts of ill-structured and complex whole. Fact-surrogates are partial pictures drawn with the cognitive tools of particular disciplines. (St. Clair, 2006, p. 59)

This quotation highlights that poverty, like any other social problem, does not escape the individual and political values of those who have the influence to create and disseminate knowledge about it. As I explained in the previous section, I am interested in what has been constituted as the field of discourse and in the ways that these banks portray poverty because I will link them to the ways that they seek to organize and control the field (p. 66).

In acknowledging the importance of the definitions and relationships with the methods of approaching what is being defined, the (2006a) commented:

> To know what helps to reduce poverty, what works and what does not, what changes over time, poverty has to be defined, measured, and studied—and even experienced. As poverty has many dimensions, it has to be looked at through a variety of indicators—levels of income and consumption, social indicators, and indicators of vulnerability to risks and of socio/political access.

This statement highlights the relationship between the perception (definitions) and the intervention. And, although the ideas in it somewhat acknowledge a level of social construction in defining poverty, it does not discuss the values and perceptions of the particular institution that constructs it. In order to consider the values attached to the definitions and in order to better understand the policy altogether we need to raise a few more questions. Two important questions are: is poverty always bad?, does geography/place define it? I think that poverty is a measure of comparative wealth that sets the same hierarchy in different parts of the world. What varies from place to place is the definition given to each level of the hierarchy. For example, making 10 dollars an hour in Canada may constitute a person as a destitute poor, while in Mexico it may constitute a person as a conjunctural poor, but in Zimbabwe that same amount may set someone at a higher level in the hierarchy of wealth. Regardless of how wealth is measured, what remains stable across regions and nations is the existence of a hierarchy that classifies and distinguishes poor from rich; those who have, from those who do not have. But, is it bad to be classified as a so-called "has not"? I think it depends on the society where this occurs and on the source of the classification. In a capitalist society of a wealthier country where material possessions play an important role, being poor may be more detrimental than in a poor society where the level of poverty in the hierarchy is broader. Especially because poverty in richer societies is often linked with the lack of other capitals, such as linguistic, cultural, and political capital that together with the economic capital are necessary for individuals to effectively participate and survive in the economic system. Also, if the source of poverty is external to the area or group defined as poor, it may be portraying a perspective shaped by a set values alien to that group. Poverty is a highly contested field that we need to continuously debate to be able to generate more alternatives not only to address it, but also to broaden our perception and treatment of it. In this regard Asuncion St. Clair (2006) pointed out that it is necessary

> to open up a space for debating the possibility of more salient, credible and legitimate knowledge about global poverty, leading to more democratic and accountable knowledge production, and to a more transparent vision of the world orders entangled in such knowledge. (p. 58)

Human Capital: Associating Schooling With Development

The notion of human capital is frequently used in political discourse and policy documents in referring to the importance of schooling and development. This notion posits that by providing individuals with a set of knowledge and academic experiences, they will contribute to the development of their nations. Human capital links schooling with development and thus portrays education as a crucial strategy for the economic improvement of nations and individuals. This is sustained on the idea that education is an asset that leads to the acquisition of other types of capital such as economic, political, linguistic, and cultural (Bourdieu, 1998; Wolf, 2004). All of these capitals are necessary for the success of nations and individuals, but human capital, because of its recent increasing popularity, has become the most dominant and is making itself the focus of attention not only in political discourse, but also in research. This research addressed the concept of human capital because the notion of education for prosperity is based on the principles that I explain further in the following sections.

Academics from the field of business who were interested in the economics of education first coined the perspective of human capital. One such academic was Gary Becker (1993), who, in his analysis of the importance of education, introduced a series of numerical calculations to determine the rates of return from investing in education and to find out if the cost of education is worth it. He identified several types of capital; among them, education, training, and health stood out. According to Becker, these three are human capital because they are embodied in people; individuals possess them and can use them to generate currency. This means that, regardless of the circumstances, people cannot be separated from these types of capital and can always utilize them to make a profit

(p. 16). Thus, according to Becker, “Education and training are the most important investments in human capital” (p. 17).

From this perspective, education is not a pedagogical space that shapes critical individuals with knowledge that will allow them to question and transform their world; nor is it a space to advance the reproduction of scientific research. Instead, it is a space where future workers acquire the know-how to perform certain activities that are valuable to the labour market. It is a formal, legally validated method to acquire and certify knowledge that will allow workers-to-be to participate in the labour market.

Although primarily economic, from the banks’ perspective, the benefits of education extend to areas such as poverty reduction, gender equality, child health, maternal health, lower rates of HIV/AIDS and other communicable diseases, environmental sustainability, and improvements in fertility decisions. According to the WB (as cited in Bruns et al., 2003), education “helps people develop their human capabilities to make better choices, seek a voice in society and enjoy a better life” (p. 28). The inclusion of these other areas shows the social face of the bank. However, emphasis on the economic side of education is also salient in the banks’ mentalities, programs, and techniques, as I will show in the analyses in subsequent chapters.

Globalization: Linking the National and International Actors Involved in Shaping Education

Policy Actors: Multidirectional Influences

Although in the two studies that I carried out I have attempted to describe the way that WB and IDB definitions and policies are implemented in international and national settings, they do not assume that policies are created in a unidirectional, hierarchical way in which those at the macro level (the international organizations) develop the policy and those at the micro level (the state and its specific institutions) implement the policy. Similarly, they do not place global forces in opposition to local forces, or global and local values as a conglomerate. Instead, they see them as forces that complement each other in the process of creating educational policies, recognizing that the capital of different players determines the level of their influence in the policy formation process.

According to my reading of the policy development literature, a policy is developed and influenced with the participation of multiple actors of varied positions, not just of actors with the most influence (Ball, 1994, 2006; Bowe, 1992; Howlett & Ramesh, 2003; Taylor, Rizvi, Lingard, & Henry, 1997). Taylor et al. referred to these actors as "interest groups" (p. 3) and highlighted how these groups influence and develop policy: "As society has become more complex and interest groups more assertive, governments have had to construct policies which attempt to respond effectively to their demands." (p. 3). Howlett and Ramesh identified a similar group of actors whom they called "interest networks" that operate within "discourse communities" (p. 54). Among the actors whom Howlett and Ramesh identified, one finds international, state, and societal actors. With regard to the role of different players in the policy development process, they explained that "individuals, groups, and classes participating in the policy process no doubt have their own interests, but how they interpret and pursue their interests and the outcomes of their efforts are shaped by institutional factors" (p. 53). In addition to institutional factors, Taylor et al. identified "dominant interests of capitalism" (p. 4), which, combined with oppositional interests, produce the policy: "Education policies do not emerge in a vacuum but reflect compromises between competing interests expressed by the dominant interests of capitalism on the one hand and the oppositional interests of various social movements on the other" (p. 4). (I will explain these terms later.) But under the argument that the different policy actors may have an asymmetrical influence on the field, it becomes relevant to study the characteristics of their influence. In this case, the institutional field is the education sector, and the actors are the international banks (WB and IDB) and the Mexican government. Thus, throughout this thesis I explore the role of these actors and the characteristics of the field in which they operate that influence the creation of different ways of perceiving education, making policy, and practicing education.

In thinking about the influence of the different actors in the policy and the role of the institutional field to which they belong, it is important to consider that their influence may be determined by their status and by institutional factors

(Howlett & Ramesh, 2003, p. 53). The status and the institutional factors at times help them to oppose, modify, or support the policy that is being developed. International organizations such as the WB and the IDB have a dominant status shaped by their scope, operations, legitimacy, and methods. In the following section I explore this in more detail.

Policy Trek: From Global to Local and From Local to Global

In addition to recognizing the multidirectional influence of different actors in the formation of the policy under study, I acknowledge that I need to delineate my distinction between international and national. This distinction may be blurred because of the increased cross-border relations that entangle the global with the national and the local, which Sassen (2001) described as

> a global dynamic or process [that] may partly operate through a national institution. Thus we cannot simply assume that because a transaction takes place in national territory and in a national institutional setting it is ipso facto intelligible in terms of the national. In my reading, the imbrication of global actors and national institutions is far to complex for that. (p. 275)

Sassen further explained how global processes overlap between national and local spaces and make the distinction between these spaces less fixed:

> Global processes are often strategically located/constituted in national spaces, where they are implemented usually with the help of legal measures taken by state institutions. . . .
>
> Most global processes materialize in national territories and do so to a considerable extent through national institutional arrangements, from legislative actions to corporate agendas, and are thereby not necessarily counted as foreign. (pp. 264-274)

Sassen was talking not only about a national or an international space, but also about the processes or dynamics that shape those settings, which I think partially help us to differentiate the national from the international setting—partially, because there is still an overlap, but an overlap that still allows individual characteristics to stand apart. This means that the distinction between global and local is blurry but nonetheless exists.

Thus, when I refer to the global, I refer mainly to a multinational conglomerate governed by a conjunction of states or nations. I see multinational organizations as global because they work in collaboration with multiple nations (Bøas & McNeill, 2003). When I refer to the local, I frame it as a space led by one national state with occasional interventions (of varied degrees) in foreign states (in this case the nation of Mexico constitutes the local). More specifically, my definition of the global considers the performance of two supranational organizations: the WB and the IDB in Latin American nations; whereas my definition of the local refers to a determined nation: Mexico. All of these definitions and differentiations will, of course, have overlapping characteristics.

However, my analysis of the policies of education for prosperity, although deductive in nature as they move from the macro to the micro level, does not assume that the policies are created at one location and adopted at another location and that both of these locations are fixed (Bøas & McNeill, 2003; Sassen, 2001). My analysis follows the order of global-national because the policies were formally put into policy documents at the global level by these international organizations and then implemented at the local level by the governments and their localities.

Globalization Theories and Multilateral Organizations

Many scholars have sought to create some understanding of globalization, its meanings, origins, links, development, scope, benefits, and disadvantages. One such scholar is Manfred Steger (2002), whose analysis of the social formations around globalization stands out among the many works that address this topic. He pointed out that globalization is not an agencyless process, but instead is managed by market agents who seek primarily to introduce the Anglo-American free-market doctrine:

> Presented to the public as a leaderless, inevitable juggernaut that will ultimately produce benefits for everyone, globalism has emerged as the dominant ideological vision of our time. It provides much of the conceptual and cultural glue that sustains the social and political power of neoliberal elites throughout the world. Its well-publicized promises of material well-being and social mobility often sustain consensual arrangements of rule, thus providing the foundation of what Antonio Gramsci has called "hegemony. (p. 79)

Steger posed a central question to assess the impact of globalization on society and its members: "Does globalization increase cultural homogeneity, or does it lead to greater diversity and heterogeneity? Or, to put the matter in less academic terms, does globalization make people more alike or more different?" (p. 34). This question bears some importance to this research because although I am not studying globalization per se, the topics that I address are influenced by the processes of globalization and at the same time have global implications. Other academic works (Bøas & McNeill, 2003; Neu, Ocampo Gomez, Ponce de Leon, & Flores, 2002; Peet, 2003, 2007; Steger, 2002) have highlighted and reemphasized that the WB and the IDB are agents of globalization and homogenization. They are global agents because, in addition to engaging in lending activities, the banks foster homogenization by encouraging specific mentalities, programs, and technologies in a variety of institutional settings, thereby "spanning" fields (Neu, Ocampo Gomez, et al., 2002) and controlling distant fields (Bøas & McNeill, 2003). This not only produces homogeneity among institutional settings, but also influences the direction in which the policies are implemented and how they are enforced and reproduced.

Alongside homogeneity, another factor that scholars of globalization have discussed is a type of imperialism. As Arjun Appadurai (2001) put it, "Globalization is inextricably linked to the current workings of capital on a global basis: in this regard it extends the earlier logics of empire, trade, and political dominion in many parts of the world" (p. 4). This suggests that all of those who play a part in globalization partake in a type of imperialism[3] of a new order, an imperialism dominated by capital.

Leslie Sklair (2004), another scholar of globalization, in his discussion on the different approaches of globalization, explained that "globalization is seen as something that powerful states do to less powerful states, and something that is done to less powerful groups of people in all states" (p. 40). According to Sklair, this imperialist or colonialist perspective is reduced to the capitalist side of globalization, and, to gain a better understanding of globalization, one must consider its other sides: economic, political, cultural-ideological. Although in this research I have not endeavoured to directly understand the imperial side of the global practices in the field, to a very great degree the analysis of the vocabulary, definitions, and notions of education for prosperity grasps instances of imperial ideological hegemony attached to the notions of education as the banks conceive them.

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[3] Empire or imperialism is understood as "the practice, the theory, and the attitudes of a dominating metropolitan center ruling a distant territory" (Said, 1993, p. 9).

Regardless of who participates and how they participate in projects with global repercussions, the main observation here is that the projects of the WB and the IDB link disparate fields and encourage standardized or globalized perceptions and practices (Neu, Ocampo Gomez, et al., 2002; St. Clair, 2006). Linking activities refers to the existence of organizations that operate in more than one part of the world and introduce people, ways of thinking and speaking, and specific practices into "new" fields.

Analyzing the relevance of the work of these two institutions has helped me to better explain not only the historical trajectory of the notions of education for prosperity at a global level, but also the historical conditions and the role of the different actors throughout the process of developing these notions of education.

More Analytical Tools for the Two Studies: Laying Down the Theory

Discourse Analysis From an Historical Approach

Discourse played an important role in this research because my goal was to understand the treatment of the notions of education and poverty in the political documents of the two banks and the Mexican government, including the modifications to these notions over time and the events that have influenced them. To meet my objective, I used Foucault's methodological and theoretical tools to guide my research and interpret the findings.

Foucault (1996a), in his inquiries into history, considered the discontinuities of the past rather than trying to reconstruct the past in a linear manner. Rather than describing interpretations and detecting implicit silent or dormant meanings in discourse, he was more interested in the manifest appearance of discourses and their criteria for formation and transformation (p. 40). This implied a need to examine the conditions and correlations to detect the changes that affect the objects, the operations, the concepts, and the theoretical options in the discourse. It implied a need to describe the *epistemic* of each period, the deviations, the distances, and the relations of its multiple discourses. Foucault defined epistemic as

> a space of dispersion; it is an open field of relationships and no doubt indefinitely describable. . . . The epistemic is not a slice of history common to all the sciences: it is a simultaneous play of specific remanences. . . . [It] is not a general stage of reason; it is a complex relationship of successive displacement in time. (p. 35)

To describe discourse in this manner, Foucault analyzed history by "studying whole sets of discourses, characterizing them, defining the play of rules, of transformations, of thresholds of remanences, compounding them, describing the clusters of relationships" (p. 36).

In his archaeological approach, contrary to the idea of looking for that which is hidden or excavating to find what is buried, Foucault (1996a) referred to the "description of the record" (p. 58) and to finding relations on the very surface of the discourse. This description of the record is relevant to my research task, because it helped me to describe the details of the particular conceptions that emerged in different times with regard to poverty and education, and it helped me to focus on how, not only what was recorded.

This archaeological approach helps to describe what has been constituted as the field of discourse, the type of discoursivity that has been appropriated to certain domains; the themes destined to disappear, to be remembered, to be circulated, or to be censured; and which groups influenced all of this as well as their level of influence and the methods used to achieve that influence (Foucault, 1996a, p. 40). The archaeological approach is closely linked to the genealogical one because it provides the details of the emergence of particular conceptions. It is not just about finding out what and when conceptions or notions appeared; it is necessary to describe why their appearance was relevant or irrelevant, why it stayed or disappeared, and what the implications on its existence were. Genealogy and archaeology have given this historical analysis richness and a broader perspective.

In thinking about different approaches to this research, I realized that Foucault's approach is also important because he offered guidance to understand the mentalities, programs, and technologies in a historical analysis just as he did in his study of the asylum. Thus, a discourse analysis of poverty and education that incorporates a Foucauldian approach linked the two studies. In the first, it helped me to understand the mentalities of the banks by studying their discourses, the programs that they used to translate those mentalities into practice, and the techniques that they used to materialize both. The second study helped me to see the level of influence of the banks and how these mentalities, programs, and techniques have changed throughout history in the context of a specific country. Foucault's (1991b) type of inquiry gives preference to questions that seek an understanding of 'how' instead of 'what' because he was interested in understanding the process through which something moves to come, to be, or to get to a point of conceptualization or representation (p. 74). He was interested in the history of the present, in what preceded what now is. For example, in studying the conception of *mad* or *insane*, he studied what is associated with the classifications of *mad* and *sane*, how it is that the mad came to be represented as mad, and the consequences of these representations. In this case I conducted my study with questions through which I sought an understanding of how notions of education, economic prosperity, and poverty evolved to their present-day meanings. I agree with Foucault (1984a) that to understand the present configurations of meaning, one needs to consider the influence of history (p. 87). Thus, in my work I tried to describe this process by going back and studying the trajectory, modifications, and upheavals of the aforementioned notions and by taking into consideration the historical context that might have influenced the notions as we now know them.

Genealogical Approach

In his study of morals, Nietzsche (1967) conducted a genealogical study in which he investigated how the notions of good and evil are used and represented and how the different representations affect the lives of people. It is interesting that he found that the definition of these and other terms is associated with particular actions in the world and that powerful figures use these associations to regulate the behaviour of social groups. His findings on the association of terms with actions and the effects of definitions of concepts made him realize the importance of being historically aware of different conceptions because the reason for their emergence cannot be understood through only their utility or purpose:

> However well one has understood the utility of any physiological organ (or of a legal institution, a social custom, a political usage, a form in art or in a religious cult), this means nothing regarding its origin, . . . for one has always believed that to understand the demonstrable purpose, the utility of a thing, a form, or an institution, was also to understand the reason why it originated. . . . But purposes and utilities are only signs that a will to power has become master of something less powerful and imposed upon it the character of a function; and the entire history of a "thing," an organ. (p. 77)

Nietzsche's work was valuable in this research in that it shows why concepts and definitions are not neutral, one-dimensional, or ahistorical. Given that I wanted to conduct a study that would question the multiple dimensions, the historical bases, and the effects (in policy making) of the conceptions of education as a tool of development, his genealogical analysis gave me adequate theoretical tools to conduct this research and interpret the findings.

To provide a clearer definition of a genealogical study, I should mention that genealogy helps itself from history, but is not history, and similarly history helps itself from genealogy. Foucault (1984b) explained how they differ from and complement each other:

> The purpose of history, guided by genealogy, is not to discover the roots of our identity, but to commit itself to its dissipation. It does not seek to define our unique threshold of emergence, the homeland to which metaphysicians promise a return; it seeks to make visible all of those discontinuities that cross us. (p. 95)

But genealogy is not only about finding the moment in history when a theme or a notion became relevant; it is also about revealing events, human interests, and the minuscule details that accompany its birth and are attached to its conception. It involves a search for the details that produced it, but also the effects on the subject (p. 83); its task is to expose a body totally imprinted by history and the process of history's destruction of the body (Foucault, 1996a, p. 376).

Foucault's (1996a) desire to question taken-for-granted ideas is based mainly on his observation that political explanations are partial in that they say little or nothing of their history. That is why he suggested ignoring this type of explanation and, instead, inquiring how words came to be defined the way they are and what forces influenced the discourses and which rules of formation and systems of functioning lead to the conception of certain definitions (p. 58). Education as a way to combat poverty is a taken-for-granted idea at an institutional and to a large degree social level. Our institutions and the way that they are structured are designed to accept and reproduce this definition of education. It is important to stop and question this very simple and basic relation of education and poverty and analyze how we came to put them together.

I am aware that a political explanation of the utilitarian conceptions of education is not necessary because several investigations of this type have already been done (most of them by the financial institutions that provide loans for education). It is more necessary to examine the history of the current definitions; analyze their trajectory, influences, and upheavals; and then explain how these factors influenced the definitions.

Mentalities, Programs, and Technologies: The Foucauldian Perspective

Throughout Foucault's work one finds concepts such as mentalities, technology, and program to describe the process that different governing States use to achieve the goals of government. Government from Foucault's (1991a) perspective is not the imposition of laws, but rather the management of people and their territory in such a way that it will naturally lead to the desired result. Government is about "employing tactics rather than laws, and even of using laws themselves as tactics—to arrange things in such a way that, through a certain number of means, such and such ends may be achieved" (p. 95).

In the type of government that Foucault (1981) described, the selection of specific mentalities, techniques, and programs is crucial to ease the arrangement and management of people and resources. The mentalities can be defined as the principles that guide the actual government; they are the "reason of state" (p. 243). These mentalities manage the whole project of government and define the types of principles and methods used to sustain and reproduce power. The technologies are the tactics, means, and methods used to achieve the control of individuals and sustain the power of the state. And the programs are the specific modes of intervention used to arrange people and their conduct to achieve the desired ends (p. 242).

This approach to the analysis of government is relevant to this research because, as I explained earlier, the intervention of multinationals through loans and projects across nations makes them not only agents of globalization, but also agents of government. Multinationals' interventions in distant fields are never purely altruistic and disinterested; they have an agenda of government (Bøas & McNeill, 2003). The said agenda is evident in the package of transformative policies and conditions attached to the multinationals' lending, which gives them control over the way that education is managed. And as Foucault (1991) explained, it is not a type of coercive government, but a collaborative one in which the governed become compliant. Thus, deciphering the mentalities, technologies, and programs of the multinationals is important to understand their strategies of control and how through their definitions of education they manage to transform people and their field.

Habitus, Capital, Field

Pierre Bourdieu's (1998) work is remarkable for his trying to make sense of the relation between institutions or fields and the people and their roles within them. He introduced concepts that are important to understand how individuals' behaviours and practices are conditioned by history and influenced by their fields, their roles, their perceptions, and their mental structures of how the world should function. Some of those concepts are habitus, capital (cultural, symbolic, political, economic, and linguistic), and field. For Bourdieu, capital is not only material or tangible goods, but also intangibles such as prestige, education, political influence, and so on. Capitals tend to be self-reproducing. Once an individual has them, it is possible for him or her to conserve, trade, and increase them. Capitals also offer individuals the possibility of standing out among those who do not have them; thus they *distinguish* those people who have them from those who lack them (p. 34). The policies under analysis in this thesis operate under this assumption. They consider education a capital that will allow individuals to have access to other capitals that in turn will open up economic and social possibilities to them.

The concept of habitus is defined as principles of differentiation: what some do that others do not. But more important than what is done is how that particular practice is done, the mental scheme under which the individual operates to achieve a particular objective (Bourdieu, 1998, p. 8). This scheme determines not only how something is done, but also how something is perceived, and this scheme is determined by history and other social conditions (Bourdieu, 1990, p. 54) that the individual does not necessarily intend or will, and for that reason the selection of what is done and how it is done is, most of the time, arbitrary, spontaneous, or accidental. Habitus is then defined as “the durably installed generative principle of regulated improvisations” (Bourdieu, 1977, p. 78). Those regulated improvisations serve as a common code and allow us to respond and adapt to cultural rules. Bourdieu further defined habitus as a law “inscribed in bodies by identical histories, which is the precondition not only for the co-ordination of practices but also for practices of co-ordination” (1990, p. 59). Understanding how the habitus works was very important to this research because it helped me to understand whether and how the interventions of external players in the field of education changed the habitus of the players in the field.

The field is the space where the interactions between individuals take place, where their habitus (Bourdieu, 1990, p. 54) is displayed, and where their capitals are configured and shaped. Bourdieu defined field as a “system of social positions structured internally in terms of power relations. More specifically, a field is a social arena of struggle over the appropriation of certain species of capital” (p. 66). Fields can be autonomous (independent) or heterogeneous (influenced by other fields and their different structures). Education is an heterogeneous field influenced by the interference of external players such as banks; that is why it is important to understand whether and how it has accommodated the interests of these other players and its own and what the results have been. The following chapters address these questions.

Conclusion

This chapter is a broad perspective of the context and rationale that shaped the conceptual and theoretical basis of this research. In the conceptual framework I reviewed terms such as education, poverty, and globalization and suggested that it is important to consider the role of different actors in shaping education for prosperity policies. I reported that in this globalized environment policies of education and poverty are not created in a unidirectional way, nor are they equally influenced by the interests of the groups involved in their design. For example, I have shown how knowledge production with regard to the themes of education and poverty is dominated primarily by influential actors such as the WB and the IDB. I have also suggested that in examining the policies it is important to keep in mind that they are not neutrally created but mediated by the values and interests of influential actors.

On the topic of education I gave examples to show that the way that it is conceived influences the way that it is practiced. I also raised a few concerns about the way that international organizations are currently portraying it. On the topic of poverty I addressed its a multilayered, multidimensional process and suggested that from the perspective of influential groups is still too narrow in scope, aside from important aspects such as its link with global causes and consequences. On the topic of globalization I pointed out the importance of considering that a policy is influenced by multiple geographical and institutional spaces and that its shaping occurs in a multidirectional way. I conducted this analysis with the objective of defining and differentiating the two areas with which this research deals: the international and the national. The objective was also to acknowledge that I am aware of possible overlaps between these two settings because of the level of globalization in which they are immersed.

In the theoretical section I reviewed the approaches and contributions of authors who have developed comprehensive frameworks for the historical analysis of texts, including Foucault and Nietzsche. I also included an analysis of the work of Bourdieu, from whom I borrowed ideas to understand the role of institutions, fields, people, and the capitals within them.

My discussion of the work of Foucault sustained that a historical analysis needs to consider the criteria of formation and transformation and the conditions and correlations of the discourse. I also addressed the importance of describing not only the record, but also the description, which points to the method that something uses to be considered a field of discourse. My overview of Nietzsche's ideas suggests that definitions or defined topics are directly linked with particular actors and with their ways of seeing and valuing the world. My review of his work also added to the richness of my method in that he provided tools for genealogical analyses. My review of Bourdieu's theoretical framework suggests that a social phenomenon is understood after a consideration of the institutions, fields, and capital. I also suggested that the trend of representing education in terms of development, as influenced by his work, is dominated by the role of powerful actors within the field of education, that banks such as the WB and the IDB constitute these types of actors, and that their work and influence need to be carefully analyzed.

CHAPTER 3:

BANKING ON EDUCATION: A 45-YEAR ANALYSIS OF WORLD BANK AND INTER-AMERICAN DEVELOPMENT BANK SHAPING OF EDUCATION

Introduction

> Education is central to development. It empowers people and strengthens nations. It is a powerful "equalizer," opening doors to all to lift themselves out of poverty. (WB, 2005c)

Internationally, many academics question, evaluate, and test assumptions on the benefits of education to certain nations or economic blocks (Rhoades, Maldonado-Maldonado, Ordorika, & Velazques, 2004; Robertson, 2005; Wolf, 2002). But to date, no analyses have considered the historical conditions that gave birth to the notion of education for prosperity as we know it. Has education always been defined in utilitarian terms? How was the current definition of education shaped? What were the social forces and who were the actors that contributed to the generation of the notion of education as a method to combat poverty? What is the historical trajectory of education? I postulate that our understanding of recent reforms in education can take place only through an examination of past and current ideas and conditions related to the notion of education for prosperity (Bourdieu, 1990, p. 54; Bourdieu, 1998, p. 138; Foucault, 1996a, p. 46). In this study I explored new possibilities for conceiving and practicing education. It provides us with a record of past practices so that, as the system continues to change, we will have a written memory of how it worked.

In this chapter I include an analysis (organized in decades) of how the IDB and WB have shaped the current definition of education. I begin by explaining what the WB and IDB are and the types of activities in which they are involved; I then present a quick overview of Latin America, which is the region that I selected from which to sample documents from the databanks of the two banks to help me to understand their policies for education. Then I examine the documents for each decade from the 1960s to the present, with an overview of the historical context of that time for the region, for the banks, and for each country for which policy documents were selected. Last, I analyze the mentalities, the programs, and the techniques that these banks have used to address and define education.

World Bank and Inter-American Development Bank

The primary objective of numerous multilateral institutions such as nongovernmental organizations (NGOs) and international and regional development banks is to encourage and maintain peace, prosperity, and the economic and social well-being of underdeveloped, developing, and developed countries. In this study I have closely examined the WB and IDB. I selected these institutions because their technical, financial, and political involvement makes them two of the most important institutions within the Latin American region and because I wanted to delimit my selection of documents that they produced to one region.

These financial institutions have had an increasingly important role in education by funding educational projects that have significantly influenced the content, methods, and objectives of education throughout the world.[4] They consider education a sector of society with the capacity to positively impact the economy of nations. Thus, education is an area of investment and an activity that every nation should foster to achieve economic success. In support of this perspective, these institutions finance several projects every year in the area of education: 1,916 WB projects and 749 IDB projects in education as of March 2007 (IDB, 2007b; WB, 2007b). As Figure 1 shows, since the WB began to support education, it has devoted great amounts of funding to it. In fact, the WB (2005c) claimed that it is the world's largest external financer of education. The WB (2007b) includes seven subsectors under the rubric of education, each of which funds a different number of projects: 51 for adult literacy/nonformal education, 390 for general education, 67 for preprimary education, 465 for primary education, 291 for secondary education, 392 for tertiary education, and 260 for vocational education. Its ample participation in education makes it a significant player in the policies, decisions, and direction of education worldwide.

The IDB (2007d) has also participated in the funding of 749 projects in education, 24 for preschool and early childhood education, 60 for primary and secondary education, 182 for higher education, 74 for adult and informal education, 65 for education management and reform, 34 for rural and distance education, 42 for science and technology, and 40 for teacher training. In total, the IDB has invested US $5,431.6 million in education. Its participation in the

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[4] As I will show in the PADs and other publications in the Analysis section.

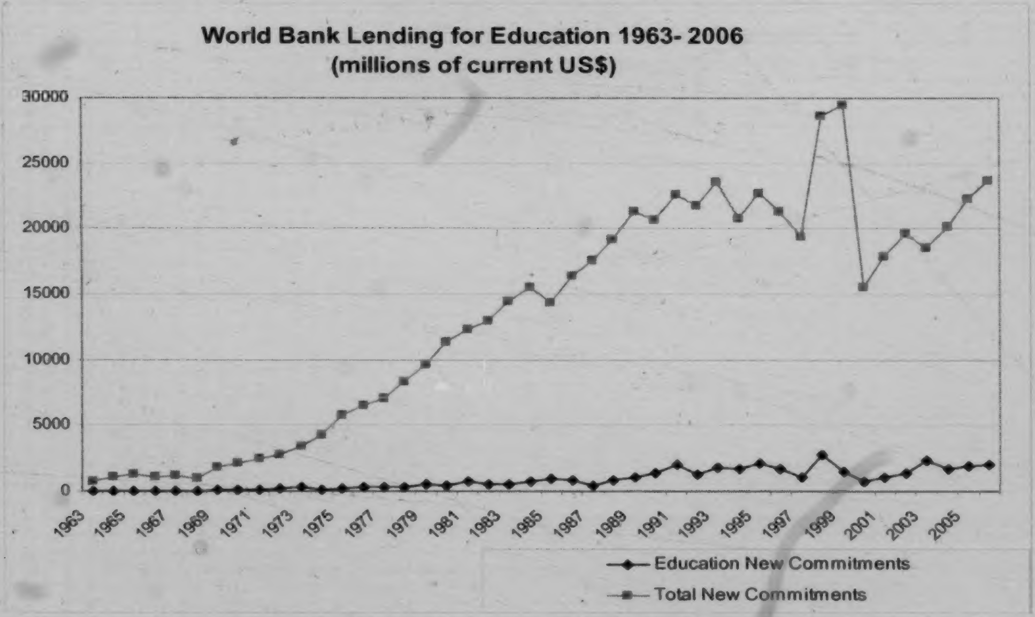

Figure 1. WB lending for education 1963-2006 (WB, 2007a).

funding of education places it as one of the leading financers in the Latin American region, and therefore an influential institution in the development of educational policies in the region (Figure 2).

International institutions such as the WB and the IDB claim the necessary know-how and expertise in the area of development, and they continue to produce and control this knowledge (St. Clair, 2006). Thus, it is important to study these institutions and their mentalities, technologies, and programs for education and development and to asses their claims of expertise. St. Clair proposed that "engaged criticism" (p. 58) is necessary to improve our knowledge of development and eradicate poverty. This requires an understanding of how

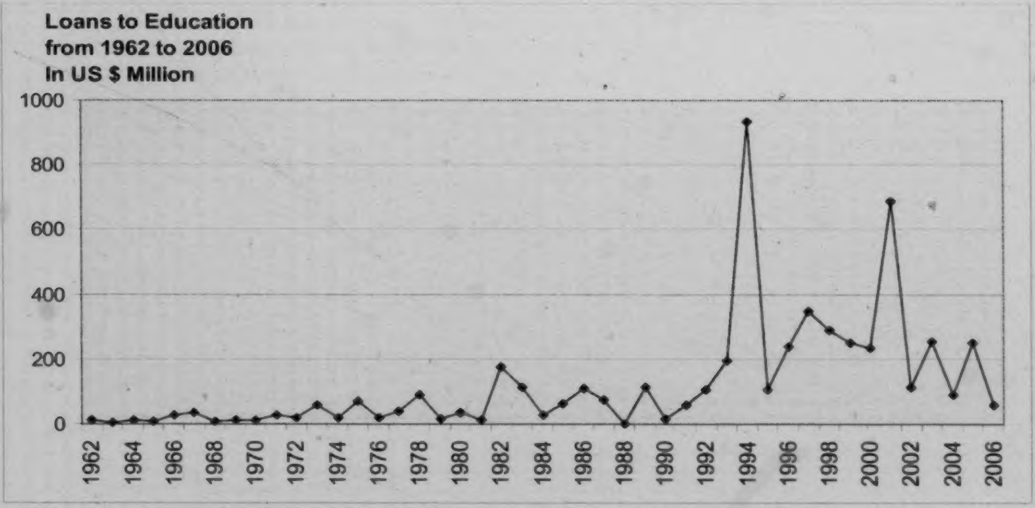

Figure 2. Loans to education from 1962 to 2006 (IDB, 2007d).

institutions such as these produce and sort out knowledge, and this understanding will allow us to produce constructive alternatives that will influence the lives of people in "poor countries that depend on the knowledge and policy recommendations issued by expert bodies like the Bank" (p. 58). Thus, understanding the WB's and the IDB's influence in how education is conceived and practiced was crucial to this study and is the basis for understanding where education is headed and whether or not investing in it will be a win-win strategy for everyone.

Latin America From the 1950s Onward

Beleaguered by civil wars, despotic governments, foreign intervention, innumerable human rights abuses, social unrest, violent transfers of power, widespread poverty, and a whole host of other related issues, the countries of the region have spent the past five decades wallowing in the mire that is the legacy of postindependence governments. Although these political, social, and economic struggles can be traced back to the times of the conquest (Burkholder & Johnson, 2008), it was partly the political differences of ideological blocs—Communist, socialist, fascist, and capitalist—that fomented the upheavals of the 1950s onwards. The capitalist interests of foreigners and locals and the newly introduced socialist ideologies collided to create an environment of fear, driven by passion/fanaticism and leading to violent interventions and painful resistance (Lovell, 2000). Although many began to sympathize with socialism, those with power and influence clung to the benefits that capitalism granted them. The policy documents of the WB and the IDB[5] are silent on this combination of political events and struggles, but the following analysis reveals that the region's political environment influenced how education was perceived and educational policies conceived.

1960 to 1969: From Agriculture to Industrialization:
From Reconstruction to Social Development

Context

While the region was in a rural to urban transition, the WB and the IDB were shifting their goals from reconstruction to social development and changing their targeted groups from post-WWII countries to middle- or low-income countries (Bøas & McNeill, 2003, p. 52; WB, 2004a). Education funding from these banks began at the end of the 1960s. Although the target of these banks has changed, they have maintained their agenda of economic prosperity since their emergence. This economic agenda promoted growth without ever explaining whether it would benefit the whole population or solely a particular group (Bøas & McNeill, 2003, p. 73).

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[5] Bøas and McNeill (2003) explained how analysis and politics are separated in the policy-making processes of the WB and other banks: "For World Bank staff, policy is essentially a sphere of rational analysis, whereas politics is dominated by irrationality (Santiso, 2001). They therefore tended to assume that analysis and politics can be separated in the process of policy making" (p. 71).

When these banks incorporated education into their agenda for economic growth, they had to generate educational projects. Their early work on education was limited, and I was therefore able to find only two education projects in the WB databases, one in Colombia and the other in El Salvador (International Bank for Reconstruction and Development [IBRD], 1968, 1969). Reports or publications on elementary education from either of the banks were nonexistent, and as I discussed in the method section, there was no access to IDB projects of that period. The following section discusses these two projects.

Colombia. Politics in Colombia during the 1960s was marked by attempts to recover from anarchy and the legacy of the neofascist, dictatorial governments of the previous decades. Some events that occurred during this decade were the party coalition between liberals and conservatives called the National Front,[6] the resulting resistance to the National Front, the economic instability produced by the coalition governments, and international lending agencies' withholding of aid or loans in 1965 to persuade the government to stabilize the economy (Johnson, 1965; Martin & Wasserman, 2005; Sturges-Vera, 1988, p. 419). Important political players were Valencia (president from 1962-1966), who lost international support from external lenders because of poor economic management. After Valencia, the liberal Carlos Lleras Restrepo led the National Front (from 1966 to 1970); he endeavoured to stabilize the currency and reduce inflation and adopted a more open economy by diversifying and expanding exports.

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[6] The National Front lasted 16 years; it started as an agreement on power-sharing practices between two parties and ended as a party of its own (Johnson, 1965).

El Salvador. The 1960s in El Salvador were characterized by growing political awareness and participation (McDonald, 1969, p. 397) and by power struggles between the military and the government (p. 404). Some events that took place in this decade included the increased political activity evident in the creation of new parties, the institutionalization and regulation of the electoral system, increased voting behaviour, and the creation of the first opposition parties after 33 years of politics dominated by the PRUD[7] (Haggerty, 1988; McDonald, 1969, p. 408). The important political players during this decade were Julio Rivera (president from 1962 to 1967) from the PCN; he received support from the United States of America through its Alliance for Progress program.[8] He also changed the electoral system to allow the participation of opposition parties. Also of note was José Napoleón Duarte (mayor of San Salvador in 1964), who played an important role in the party definition policies of the 1960s; and Fidel Sanchez (president from 1967 to 1972), who led a war with Honduras over border and sovereignty issues (Carías, 1970; Haggerty, 1988).

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[7] PRUD: Partido Revolucionario de Unificación Democratica (Revolutionary Party of Democratic Unification).

[8] The Alliance for Progress was a program financed and controlled by the United States and strongly supported by President J. F. Kennedy that gave economic support to centrist governments to fight Communism and leftist guerrilla movements. Military governments were the preferred form of government for the United States, as Martin and Wasserman (2005) explained: "The United States government envisioned military dictators as the pillars of anti-communism" (p.

Analysis of WB Agreements With Colombia and El Salvador

Mentalities. It is important to mention that, although the politics of the time were controversial in both countries, the WB's policy documents make no reference whatsoever to them. Reading them without reviewing the events of that time leaves the impression that the poor outcomes of the system of education, as the bank described them, are merely the result of "population growth" (IBRD, 1969, p. 1) or the result of the system's lack of capability to grow and plan (p. 4). A contextual consideration helps us to understand why and how the social and political turbulence of the time had repercussions for the educational system.

A common characteristic of the Salvadorian and Colombian projects is the concern for qualified workers. Education equals training, and those who aspire to enter the labour market must have it. Special emphasis is given to industry jobs and the preparation of technical workers (IBRD, 1968, p. 12; IBRD, 1969, p. 20). Ergo, in both projects the bank proposed new "modalities" of education to give students at a secondary level the option of pursuing a university degree or

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420). Besides promoting anti-Communism and liberal governments, the Alliance for Progress promoted economic progress, social justice, and democracy (Barber, 1964).

vocational/technical training. Education is thus conceived as a broader training process designed to prepare students for the labour market or to allow them to further their education to the university level. This is considered a way to better address the diverse social and economic needs of the nation (IBRD, 1968, p. 2; IBRD, 1969, p. 5).

Both projects give priority to secondary education because at this level workers can be trained to address the needs of their society as well as the needs of industry, as the IBRD (1969) stated with regard to the Salvadorian project:

> 5.02 In terms of educational investment priorities, the major gaps and resulting potential constraints to further economic development in industry and agriculture are in secondary education. This is supported by discussions with public authorities and private enterprises which confirm that current outputs of skilled workers and middle-level technicians from schools and training centers are too low. In fact, the country has to attract workers from abroad to fill the gap. (p. 11)

It is noteworthy that these projects focus on satisfying the needs of the labour market rather than the needs of the labourers. As discussed earlier, Colombia had lost international support because of its unstable economic conditions. The emphasis on strengthening industry may have been a strategy to improve the economy given that industry and manpower were considered crucial elements of economic growth and stability in Colombia (IBRD, 1968, p. 8).

As for poverty and the poor, there are no references to these topics. Thus, one can conclude that these projects were not addressing the needs of the poor or designed to reduce poverty. This does not suggest that there was no poverty, because as the context section explains, the political instability in both countries negatively affected the economy considerably. However, these projects have not yet equated education with a solution to poverty.

Programs. The two projects suggested the implementation of two programs, "long distance education" (IBRD, 1969, p. 8) for El Salvador to address the shortage of teachers, and a "comprehensive education" (IBRD, 1968, p. 5) program for Colombia. The comprehensive education notion advocated a curriculum less focused on the humanities (or university degrees) and more focused on agriculture, industry, commerce, and social welfare (p. 5). It advocated an educational system that aims at not only university education, but also the training of skilled manpower:

> 4.03 However, the government plans to restructure the education system in such a way that students move away from academic education into various fields of middle-level vocational training. These plans involve some expansion but more important, a change from the present system where nearly all upper-cycle secondary education is preparation for university entrance to a diversified upper-cycle which, while providing a sound secondary education includes technical options such as industrial, agricultural and commercial subjects. (p. 9)

Training middle-level manpower was considered important, to meet the market's demand for technical/industry workers as well as to prevent expensive expansions at the university level. "Thus, there is an urgent need to restructure the system and create socially acceptable terminal points below the university level. This could save expensive over-investment in higher learning and provide trained middle-level manpower essential to economic growth" (IBRD, 1968, p. 8).

Taking into account the historical events of Colombia, one wonders whether increasing the educational ways of learning was not only to save money in university education, but also to curtail future dissent (Johnson, 1965). The fact that major opposition to the National Front in Colombia was organized at universities may have encouraged the government to reduce the university population. Seeing the potential of university students to upset the political apple cart by protesting and playing a significant role in antigovernment military movements and revolutions, it is likely that the National Front sought to limit this possibility. Emphasizing the need for technical manpower and the importance of industry for economic growth gave the government a good excuse to reduce the growth of higher education.

Techniques. To provide the type of technical and vocational education required to meet industry demands for qualified workers, both of these PADs proposed to expand the system to meet the needs of the population. Distance education aided by television was proposed to train new teachers and aid classroom techniques and contents (IBRD, 1968, p. 2; IBRD, 1969, p. 8). Additionally, a family-planning strategy was recommended to limit future population increases, which were associated with the countries' developmental problems, especially in El Salvador (IBRD 1969, p. 9). Although population growth was also seen as a problem in Colombia, family-planning strategies had already been implemented during the government of Valencia (1962-1966).

For Colombia a type of expanded curriculum gave students two alternatives: secondary training that would allow them either to enter the labour market immediately after or to pursue a professional career (IBRD, 1968, p. 12).

Satisfying the demands of the market was seen as an investment priority in the educational system (p. 9), and that was the intention of the recommended reforms and techniques.

1970 to 1979: Age of Economic Liberalization

Context

During the 1970s the region continued to ache from dictator governments, and blood flowed as leftist movements flourished and clashed with the conservative forces who sought to repress them. The 1970s were also a time of political tension within the WB organization. The war with Vietnam came to an end, and Robert McNamara became the president of the WB. His position (from 1968 to 1981) was disliked by many, and they questioned their support of the WB. The WB strengthened its association with the IDA, and they began to work together to achieve long-term development projects that targeted "relevance, efficiency and economy as key educational issues" (Bujazan, Hare, Belle, & Stafford, 1987, p. 163). McNamara redirected the bank toward poverty alleviation (Ayres, 1981, p. 106; Bujazan et al., 1987, p. 164). The IDB became a source of additional funding for projects in Latin American, especially between 1965 and 1975 (Bøas & McNeill, 2003, p. 55). During the 1970s the IDB emphasized education as an investment in human capital rather than as an expense (Bujazan et al., 1987, p. 164). Mena Ortiz, the president of the IDB during that time, gave priority to technical knowledge, vocational training, and adult rural education (Bujazan et al., 1987, p. 164; Ortiz Mena, 1976, p. 66).

Another influential event during this decade was the renewed influence of the free-market economic policies inspired by Adam Smith in the 18th century, which led to the adoption of what is known as the neoliberal economic system. Both banks embraced these policies and encouraged them globally. The status of the state changed from welfare to *laissez-fair* (Bøas & McNeill, 2003, p. 62). With these economic policies as their foundation, the activities of the multilateral banks, besides promoting development and population policies, became about promoting this particular economic model (Gavin & Rodrik, 1995, p. 332).

My analysis of the documents for this decade includes two WB PADs[9]—one for Paraguay, the other for Honduras—and two education studies: the WB study, *Attacking Rural Poverty: How Nonformal Education Can Help* (Coombs & Ahmed, 1975), and the IDB study, "Educational Funding in Latin America: A Review of the Main Aspects" (Brodersohn & Sanjurjo, 1976), respectively.

Paraguay. Paraguay during the 1970s was marked by the dictatorship of General Alfredo Stroessner, whose government lasted from 1956 to 1989 (Nickson, 1989; Sacks 1988). The length of his government allowed three stages of varied economic conditions: economic austerity, prosperity, and fiscal deficit. Important events during this period were the Itaipú treaty signed with Brazil,[10] the emergence of Paraguay as a central energy producer, the external influence of the US government,[11] and the deployment of Paraguayan troops to the Vietnam War.

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[9] No PDs from the IDB were available for this decade for the reasons explained in the Method section.

[10] Paraguay had to set up new economic treaties with other countries after Argentina cancelled its treaty with it. Brazil was a good candidate for a new agreement, but the geographic conditions between the two countries did not favour trade. This changed in 1973 when the infrastructure (roads, bridges, ports, and a dam) was built to connect the two countries (Nickson, 1989).

Honduras. Honduras was characterized by military coups and highly controversial agrarian reforms (Sieder, p. 102). Some important events that marked Honduras during the 1970s were the military coup led by Lopez Arellano in 1972, the tax scandal with influential fruit companies,[12] Lopez's poor response to the devastation caused by Hurricane Fifi in 1974 (Sieder, 1995, p. 106), and Melgar Castro's replacement in 1975 with another semipeaceful coup.

Analysis of the Banks' Agreements With Paraguay and Honduras

Mentalities. Both of the PADs considered secondary education, especially technical and vocational, as a priority because of its potential to address the needs for technical manpower, which increased as the production network of international corporations reached Latin American countries in the 1970s.

> At present, the proportion of workers with secondary, technical and vocational education is very low (Annex 21). Employers report that this lack of properly trained, skilled workers and technicians reduces efficiency, adversely affects the productivity of high-level personnel and, in some cases, endangers the success of expansion plans. (IBRD, 1972, p. 2)

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[11] Paraguay received $146 million from the Nixon government to support counter-insurgent movements. The Reagan government later denounced Stroessner's government for human rights violations and withheld financial support (Nickson, 1989; Sacks, 1988).

[12] As a major producer and exporter of bananas, Honduras had agreements with both Standard Fruit and United Fruit, who received concessions and low-tax benefits by bribing governments and politicians to be able to maintain monopolies and fix the prices of their produce (Sieder, 1995, p. 107). Various governments took positions that officially favoured land reform or the big fruit companies, and conflict broiled around these reforms (Sieder, 1995).

Unlike the two PADs, the WB study, as its title indicates, considered education a way to solve problems in rural areas that were caused by poverty (Coombs & Ahmed, 1975). The two PADs do not have the education-poverty relationship. They instead see education as a benefit more to the nation rather than to the individual—as a way to contribute to the development of the country (IBRD, 1972, p. 2; WB, 1978, p. 8). The IDB study also considered education as having an influence on poverty; hence its concern with the sources of funding.[13] It departs from the idea that education benefits several parties (individuals, society, and economy) and raises the question of who should pay for it (Brodersohn & Sanjurjo, 1976, p. 32). In the 1970s education was funded primarily by the state, but, according to the IDB, other sectors of society that were not receiving enough funding were in dire need of it because of the financial burden borne by the state (p. 17).

Similarly to the analyses of the previous decades, the PADs of the 1970s strongly emphasized technical education. Technical or vocational education was considered a means for the countries to satisfy the demands for industrial workers and consequently to develop and drive the national economies (IBRD, 1972, p. 10; WB, 1978, p. 8). The WB and IDB studies, on the other hand, emphasized nonformal education, which the authors found more feasible for rural populations or groups with reduced access to schools (Brodersohn & Sanjurjo, 1976, p. 35). The WB study defined nonformal education as "any organized, systematic, educational activity carried on outside the framework of the formal system to provide selected types of learning to particular subgroups in the populations, adults as well as children" (Coombs & Ahmed, 1975, p. 8).

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[13] The IDB document is a very comprehensive analysis of education; although it acknowledges that it can improve individuals' economic situation, it also mentions that the wealthier take the most advantage of schools. Thus it raises questions about funding, equity, and pertinence (p. 32). Of all of the documents reviewed for this decade, this one raises problematics that have been very controversial in later decades.

Programs. The WB study proposed a program for lifelong learning and another for universal education. These proposals are very interesting because these two programs have gained popularity in recent policy documents. This is worth noting because the objective of universal education proposed in the Millennium Developmental Goals ([MDGs] WB, 2004c) is to have all children worldwide in school by 2015; the plan that Coombs and Ahmed (1975) described intended to have all children in the region in primary school by 1980:

> The laudable target of achieving *universal primary education by 1975 or 1980* [italics added] which the developing nations themselves set under Unesco's auspices in the early 1960s, has proved far more difficult to attain than expected. Given the steady expansion in the number of school-age children (typically 2 to 3 percent annually) plus the rising unit costs of schooling and increasingly severe financial constraints on educational expansion-not to mention the costly reforms and improvements needed in rural schools-universal primary schooling seems a more distant goal in many countries today than when the target was set. (p. 19)

The objective of universal primary education attempted to change the priorities from technical education to elementary education.[14] This change was not immediate because it appeared in a study that is an analysis document, not a policy set in action as the PADs were. The first attempt to adapt to this goal is evident in the Honduran PAD, which proposed a school 'nuclealization' program that would consist of a number of central schools to provide the full six years of primary education and a number of 'subcentral' and associated schools that provide some of the years of education, but not the complete six-year program. The program was intended to take full advantage of scarce facilities and teachers (World Bank, 1978, p. 14). The Paraguayan PAD proposed that education be made more responsive to the economic and social needs of the country (IBRD, 1972, p. 10) and that it be aligned with the objectives of the Alliance for Progress program (p. 2). Because poverty issues were part of its existing mandate, the IDB proposed a program of subsidized loans for low-income students (Brodersohn & Sanjurjo, 1976, p. 40), with the intention of raising the student's human capital as an essential theme for the IDB.

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[14] The change of priorities is also evident in the WB databases for funding to the different education sectors.

Techniques. The techniques that Coombs and Ahmed (1975; of the WB) identified are vaguely defined, but I will list those that are the most emphasized: the use of low-cost technologies (p. 157), nonformal education (p. v), the provision of military education (as in Mexico, China, and Iran) (p. 157). The latter fits the context of the region's military governments during that period that the US supported through programs such as the Alliance for Progress for their potential to counter the spread of Communism.

The techniques that Brodersohn and Sanjurjo (1976; of the IDB) advocated are new sources (private and industry) of funding for education, especially for technical and vocational (p. 49), and taxation of the human capital that each individual accumulated, which was to be similar to the betterment taxes commonly levied in North America throughout the 1970s (p. 56). Another outstanding technique that the IDB program identified is the use of audiovisual methods to achieve the objectives of long-distance education (p. 56).

Regarding teachers, the Paraguayan project proposed the use of teacher training techniques and emphasized that better trained teachers rather than more teachers were needed (IBRD, 1972, p. 4). It also suggested that curricula be more responsive to the economy; by this the bank meant that more technical and vocational curricula should be created because it saw industry as an important engine of the economy (p. 10). The Honduran PAD, on the other hand, sought more equal access to education (p. 7), including the use of nonformal education techniques and techniques that would link the economy and development with school curricula. The emphasis on the economy and development, of course, meant that this PAD strongly supported technical education (p. 2).

1980 to 1989: Structural Adjustment Policies: Reevaluating Funding for Education

Context. Characterized as a decade of crisis, the 1980s gave the WB a chance to become the world's largest official lender of development funding. The oil shock of 1979 altered the terms of trade, but the banks continued to lend only for structural adjustment policies (SAPs) and macroeconomic stabilization (Bøas & McNeill, 2003, p. 66; Fraga, 2004, p. 94; Gavin & Rodrik, 1995, p. 332). SAPs abruptly opened the economies, which led to rapid extraction of resources; they became the approach to development in the 1980s (WB, 2007d). Massive political corruption crippled the economies of the countries even further (Scheman, 1997, p. 87). After McNamara's term (1968-1981), free-market advocate Alden Winship Clausen assumed the presidency of the WB from 1982 to 1986; and after Clausen, reformist Barber Conable led the WB from 1986 to 1991 (WB, 2007e). The IDB, under President Mena, continued with similar policies during the 1970s, but in 1988, under the new President Enrique Iglesias, the IDB took center stage in meeting the new challenges of the region (Scheman, 1997, p. 87). The IDB shifted its focus from lending to brokering between nations and financial markets (Bujazan et al., 1987, p. 165).

My analysis of the documents for this decade includes five documents: two WB PADs, a Guatemalan, and a Peruvian; one IDB PD for Brazil, one WB publication titled "Education and Development"; and one IDB publication titled "Programs and Project Oriented to Expand Coverage and Quality of Basic Education in Rural and Marginalized Areas" (Furter, 1980). Some of the defining characteristics of these documents are their systemic perspective on education and their outstanding preoccupation with the administrative aspects of education. The analysis that follows expands this description.

Guatemala. During the 1980s Guatemala had its first civilian president after three and a half decades of military governments. Vinicio Cerezo Arevalo was democratically elected in 1985 and brought relative peace and hope to the nation (Lovell, 2000, p. 70). Despite Cerezo's good intentions as president, the military was the *de facto* ruler and continued its old tactics and abuses; Indigenous populations were victims of the worst human rights violations (p. 73). Some of the methods used to bring peace included a visit from the Pope in 1983, religious missions, and the program "Beans and Rifles" (p. 59) to create civil patrols against guerrillas.[15]

Peru. Peru's politics during the 1980s were marked by its affiliation with international economic agencies that produced drastic economic instability.[16] Notable events during this decade were the implementation of IMF neoliberal economic policies and the subsequent privatizations, deregulations, government deficits, and inflation. Fernando Beleaúnde Terry (president from 1963 to 1968 and from 1980 to 1985) and Alan García (president from 1985 to 1990) were the key political personalities of this era (Mauceri, 1995; Sheahan, 1992).

Brazil. In the 1980s Brazil recovered the right to appoint civilian politicians to federal positions. This gave place to political fragmentations that had never before been experienced. Because of society's expectations of a multiparty system and the legislation passed in 1985 to ease the creation of new parties, by 1991 Brazil had 19 political parties (Fleischer, 1997). The administration of President José Sarney (1985-1990)[17] allied with the military to protect his position, which led to authoritarian decrees ranging from an antistrike law to the oppression of the press. Affected by the oil shocks of 1973 and 1979 and by the subsequent neoliberal policies, Brazil's economy experienced a GDP collapse, economic crises, high inflation, overwhelming debt, credit denials, and rural-urban migration during the 1980s (Fraga, 2004, p. 95; Perz, 2000, p. 851). Perz noted that Brazil's economy during the 1980s was characterized by "debt-led development using petrodollars" (p. 850).

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[15] In government discourses guerrillas were identified as the agitators of peace, but in practice it was the army who committed the most atrocious acts of violence against guerrilla participants and the civil population (Lovell, 2000). Guatemala was one of the countries of Latin America with the worst reputation for human right violations (p. 56).

[16] Peru joined the IMF during the government of Juan Velazco Alvarado (from 1968 to 1975) (Sheahan, 1992). The financial policies of the IMF had their first drastic effects during the 1980s, which put the country into a complicated economic situation.

Analysis of the WB and IDB Publications and PADs

Analysis of the Banks' Agreements With Guatemala, Peru, and Brazil

Mentalities. Multiple themes emerged from the analysis of these documents; education, funding, administration, and poverty were the most outstanding. I begin my analysis by looking at the way in which education was conceived. In the Guatemalan PAD, education is called "a prerequisite for overcoming the economic, cultural and social constraints of the marginal urban and rural poor" (Aklilu, Psacharopoulus, & Heyneman, 1983, p. 10). Whereas the previous projects considered education the training that people needed to be able to meet the needs of the workplace, this project presented education as a means of solving economic and economically derived problems. Similarly, the WB study define education as the engine to drive "poverty alleviation, equal distribution of income and an improved social environment" (p. 14). Aklilu et al. observed that poor countries will invest highly in education despite their limitations because to them education represents the path to development; however, it also plays an important sociocultural role. For this reason, they pointed out that development programs have to consider all of the needs of the societies they serve (p. 7). Aklilu et al. defined education as one of the "paths to development" and as one of the few paths that has been "proven to be essential" (p. 6). They defined higher education, contrary to previous publications, as the type of education in which to invest; they gave it priority over even technical education (p. 13). On the other hand, the Brazilian project described primary and secondary education as the means for students to acquire training to "develop their potential in self-actualization, job skills and preparation for the aware exercise of citizenship" (p. 3). In contrast, the IDB study critically pointed out that some see education as emancipatory, whereas to others it is a means of reinforcing the administrative control of the state over its territory (Furter, 1980, p. 32).

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[17] Sarney replaced the elected president, Tancredo Neves, after his death a month after being appointed.

In relation to funding, the Peruvian project described education as a financially relegated sector of society (World Bank, 1984 p. 11). The financial calculations in this project are concentrated on explaining why education needs more funding. It is interesting that there is no explanation of how the economy was functioning overall or the funding that the other sectors were receiving; this partiality should be questioned.

In regard to the theme of administration, the IDB authors (Furter, 1980) argued that education is situated in a society that has based the main instrument of its economic growth upon inequality, and therefore the elimination of inequality should not be expected because education can contribute to the social mobility of only some (p. 100). Also, the IDB study amply discussed and differentiated formal education from nonformal education, and the author highlighted that the "lived culture substitutes the schooled culture" (p. 98) because the latter allows the adoption of cultural codes necessary to reach consensus. These codes set up the rules of the game, constitute the dominant system of thought, symbolize the national character, and are imposed on the educated individual through a type of cultural violence (p. 98).

The WB study (Aklilu et al., 1983) associated poverty with low school enrolment: "Many youngsters . . . do not attend school due to lack of family financial resources" (p. 4); however, the Guatemalan document acknowledged that poverty is only one of the reasons for low enrolment: "This non-enrolment is due to (a) lack of schools; (b) incomplete schools; and (c) poor socio-economic conditions of families" (p. 4). The Guatemalan project also problematized families' poverty within an educational context and explained that sending children to school significantly affects the economy of the family (p. 4). Health, nutrition, a good environment, and textbooks are also connected with educational problems such as high repetition and dropout rates (p. 34). The Peruvian project also linked poverty with high repetition and dropout rates: "High repetition and dropout rates are caused by: (a) late entrance to school; (b) school absenteeism; (c) inadequate physical facilities; (d) an inadequate evaluation system; (e) language problems; and (f) poor economic conditions of the families" (WB, 1984, p. 3). Notably, the WB did not mention how the adoption of economic policies prescribed to the countries upset the economic and political apple carts and how other priorities such as food superseded education. Finally, the WB study defined poverty and the poor, whom it considered most benefit from education (p. 17) because it helps them to overcome their economic status. I suggest that further investigation is needed to asses the validity of this claim.

Programs. The Guatemalan project again considered a program of "universal education" (Aklilu et al., p. 12). Although it is addressed in earlier WB publications, this is the first time that it is introduced as an objective in a loan agreement (p. 12). The WB study also considered the idea of universal primary education and referred to it as highly profitable because of its egalitarian effects (p. 14); nonetheless, the authors pointed out that, despite its importance, 35 of the richer developing countries have not been able to achieve universal education (p. 15). Both the Guatemalan and the Peruvian projects identified education, especially primary education, as a priority or a "prerequisite" for the government (WB, 1983, p. 10; WB, 1984, p. 12) to solve various problems, among which they highlight economic problems.

The Brazilian project continued with its somewhat different approach. It proposed a program of personalized self-instruction for adolescents and adults and the provision of supplementary education through educational centers financed by private companies and government agencies of welfare for employees and their children (IDB, 1989, p. 8). This program demonstrates how privatization policies moved from theory to practice. The IDB study (IDB, 1989) proposed a program of regional development rather than general or global development, with the intention of helping to link community participation with micro planning, as well as a program of "educogenia" (p. 121), which encourages families, societies, mass media, and specialized institutions to provide education that takes into consideration their own environment.

Techniques. All agreements—the Guatemalan, the Peruvian, the Brazilian, and, for that matter, the IDB study—suggested the consideration of external factors before any intervention in education. Previous projects had not considered external events and actors in the educational process. External factors included the topics of health, environment, economics, and nutrition; it is interesting that none of these documents considered political or economic issues as external influential factors. It would be useful to read an analysis of how the neoliberal policies that institutions such as the WB and the IDB advocate influence the politics of these countries and therefore contribute to the problems that they tried to solve through education. According to these documents, analyzing the external factors is a strategy that would better address the problems.

With regard to the curricular priorities of the government, the Peruvian project recommended the conversion of upper secondary schools for professional education into postsecondary technical institutes (WB, 1984, p. 1). It talked about decentralizing the country's school supervision, which it had identified as necessary to improve the quality of the system (p. 1). This decentralization would give education a new direction as it became more closely supervised, and the administration would become a new and important factor.

Both the Guatemalan and the Peruvian projects pointed to the need for textbooks and described them as a means for students to access learning (World Bank, 1984, p. 8). The discussion of the computer's contribution to the educational system began in this project, but its benefits were limited to administrative tasks (p. 10). Again, from a somewhat different perspective, the Brazilian project considered mass media (radio, TV, correspondence) as a pertinent method of access (p. 3).

Whereas the WB study gave special priority to formal education for people to be able to perform their jobs well (World Bank, 1996, p. 17), the IDB highlighted the importance of informal education (IDB, 1998, p. 61). The IDB suggested self-education, learning for fast application, and not just technical in-classroom learning, but learning that responds to the needs, experiences, and immediate problems of the learner (p. 65). The IDB project suggested decentralization as a method to facilitate the process of decision making for community participants wherein parents have an important role (p. 125). On the theme of community and the participation of its members, the Brazilian project also suggested the formation of community centers to back the objectives of the project (IDB, 1989, p. 3).

Investment in education took a different direction in the WB study, because Aklilu et al. (1983) recommended investment at the lower levels of education (p. 14) and for higher education (only in the humanities and liberal arts) (p. 14). They saw this type of education as more affordable than technical education and believed that more women would be able to enrol, which would thereby lower the reproduction rates (p. 14). Investing in education also, according to the analyses in this document, contributes to more egalitarian societies, increases labour income, and helps with the "alleviation of poverty" (p. 14). The investment in education is correlated with the progress and success of different sectors of society (p. 9). Aklilu et al., authors of the WB study, also suggested a broader perspective on the rate-of-return approach to enable countries to have more and better information to make better investment decisions (p. 13). Finally, very evident in all of the documents that I reviewed for this decade was the emphasis on reevaluating investment in education.

1990 to 1999: Globalization, Privatization, Corporate Philosophy, Good Governance, Decentralization

Context

The 1990s can be best characterized as a decade of capitalist triumph, when neoliberal principles moved from ideology to full practice. The collapse of the Soviet Union invigorated the idea that free-market ideologies were the only useful and long-lasting alternatives for the world—and from which multinational banks grew. Multinationals, the UN, and heads of state met repeatedly to set up the targets for the MDGs. Under WB presidents Lewis Preston (1991-1995) and James Wolfensohn (1995-2005), opposition to the Bank also grew;[18] it faced more criticism, vigilance, and analysis[19] than ever before from all types of public. Thus, although the bank kept pushing the adoption of development policies, the crises[20] caused by these policies showed that development was reserved for elite groups and not intended for entire countries; the bank's loss of legitimacy at the end of the 1990s led to reform (at least in rhetoric) in the next decade (WB, 1997).

The IDB, under president Enrique V. Iglesias (1988-2005), also experienced considerable growth in its financial capacity, which placed it as a leading source of funding for Latin America. The Multilateral Investment Fund (MIF) was created during this time "to support private sector growth through grants, technical assistance and equity investments" (IDB, 2007e). Areas such as good governance, transparency, modernization of the state, reduction of violence, crime prevention, relief from natural disasters, and poverty reduction received attention and support during Iglesia's administration (IDB, 2007e).

My analysis of six documents for this decade—*Decentralization of Education: Community Financing, Vol. 1* (Bray, 1996), "Making Education a

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[18] One of them was called "Fifty Years Is Enough." For more information on this opposition group, go to http://www.50years.org.

[19] The criticisms raised from all types of the public, including members of the WB such as Joseph Stiglitz (2002).

[20] The Malaysian, Mexican, and Argentine crises are some examples of the results of applying neoliberal policies that institutions such as the WB promote (Steger, 2002; Stiglitz, 2002).

Catalyst of Progress" (de Moura Castro, Navarro, Wolff, & Cabrol, 1998), two PADs for Argentina, and one each for Uruguay and Panama—revealed an even stronger emphasis on the economic aspects of education and on the funding role of the different actors involved in it. Community participation is a prevalent theme within all of these documents, which means not only political, but also financial participation. Other recurring themes during this decade were decentralization, privatization, globalization, competitiveness, and school management. Perhaps the strongest argument in favour of shared funding responsibilities was the observation that "people who pay directly for services are likely to take a stronger interest in them than are people who receive services free of charge" (Bray, 1996, p. vi). Government-financed schools tend to take government help for granted, do little to participate, and become more demanding of funds and services (p. 20). The following analysis expands on these themes.

Argentina. Carlos Menem, with his hard-line neoliberal policies, governed Argentina throughout the 1990s. Known as the most faithful disciple of the IMF and the WB, Menem implemented privatization, deregulation, and internationalization policies as corrective measures for the hyperinflation and recession generated during the 1980s in Argentina (Llanos, 2001, p. 74; Pozzi, 2000, p. 63). His strategies, after appearing successful, failed during his second term. The strategy of tying the value of the peso to the US dollar produced unforeseen economic growth, but when the Argentinean peso lost its value in relation to the dollar,[21] the economy suffered the most dramatic of economic difficulties (Fraga, 2004, p. 98; Llanos, 2001, p. 96; Pozzi, 2000, p. 66). Unemployment, layoffs, strikes, riots, and all sorts of social upheavals were part of the economic collapse that resulted from Menem's neoliberal policies (Pozzi, 2000, p. 66). The Argentine case raised, as never before, public concern and criticism of the IMF's strategies and the WB's SAPs (Steger, 2002; Stiglitz, 2002).

Uruguay. In 1985 the country elected its first civilian president in 12 years, Julio Maria Sanguinetti. He tried to improve the economic situation of the country by focusing on popular market-oriented reforms that increased the role of international and external forces in the economy of the country. He left, without much success, partly because he was unable to reduce the size of the burdensome public sector (Blake, 1998, p. 11; Cason, 2002; Jacobo & Weinstein, 1990). Luis Lacalle became the new president in 1990. Faced with significant opposition within Uruguay, Lacalle allied with the IMF (Vreeland, 2003, p. 328), received a $150 million loan,[22] and implemented a recovery strategy that included the reduction of the public sector, the deregulation and privatization of public enterprises (all but the telephone company), and the linking of public sector wages to the projected decline of inflation (p. 329). Sanguinetti was reelected in

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[21] The dollar-peso fixed conversion rate could not be sustained because of government deficits, defaults on public debt, high external debt, and investors' insecurity about the economy.

[22] The US$150 million was later renegotiated and reduced, leaving Lacalle in bad standing because he could not achieve all that he had promised to do with that amount (Vreeland, 2003, p. 329).

1995 with the hope that he would limit privatization and renationalize some of the industries. Unsuccessful in this, he instead continued Lacalle's neoliberal program (Cason, 2002).

Panama. Since the construction of the canal in 1904, Panama has managed its policies mainly around the issues of independence, sovereignty, foreign intervention, and other areas related to the canal. As Perez (1999) put it, "The Panama canal has been a singularly important issue in Panama politics" (p. 1). Because US control of the canal was supposed to come to an end in 2000, the 1990s generated abundant debates about the implications of having or losing US control (p. 6). Important political players included Guillermo Endara (1989-1994) and Ernesto Perez Balladares (1994-1999). Endara and Perez were the first civilian presidents since 1968. Endara's major achievements were the setting of institutional structures such as the Electoral Tribunal, the strengthening of democracy, and the proscription of the military by implementing a civilian-led public force (p. 5). Perez's mandate was characterized by scandals of corruption, ecology, and politics (Gandasegui, 1999, p. 163). He deregulated labour laws, which made employment positions unstable and employees vulnerable to the market. He also worked towards the recuperation of the Panama Canal but ended up reselling the recuperated land to the highest bidder (p. 162).

Analysis of the Banks' Agreements With Argentina, Uruguay, and Panama

Mentalities. A common characteristic of both the WB and the IDB study was their emphasis on education as a cooperative process to which external stakeholders naturally contribute and in which they naturally participate. For example, the WB study portrayed education as a process that requires the participation of both government and community (Bray, 1996, p. v). The idea of self-help as a means of obtaining educational services that the government is not always willing or able to provide influences the mentality of the people and the government:

> What was originally seen as government support for community initiative is fast becoming a government programme with community support. Communities identify less closely with buildings provided for them by the government and the World Bank than they do with ones they have worked long and hard to build themselves. . . . Increased government support too easily turns into conformity and control. (p. 16)

The IDB study makes a similar argument: "During three decades, and particularly in the nineties, the Bank's involvement in the educational sector has partially evolved from top-down methods of program preparation and implementation to more participatory approaches to service delivery" (de Moura Castro et al., 1998, p. 14). In addition to the arguments about shared funding responsibilities, the link between education and economic development becomes more evident: "Education is increasingly being perceived, and correctly so, as a pivotal factor in promoting economic development, and reducing poverty and income inequality" (p. 13).

Besides the emphasis on community participation is the concern about which levels and types of education should receive more funding. The IDB's (1994) Argentine project contended that the system needs to improve preschool education (p. 3), the WB (1998a) Argentine project focused on secondary education and mentioned preschool education only in passing (p. 4), whereas the Panamanian project saw one of the main features of the project as preschool education because it prepares children and ensures a more efficient performance in their elementary education years (IDB, 1997, p. 14). The Uruguayan project, whose objective is also preschool education, thoroughly justified investment at this level. Among the benefits, the WB suggested that children would be better socialized (p. 67) and that it would improve their educational attainment (p. 13), their employment opportunities (p. 36), their learning and cognitive capacities (p. 9), and their motivation to remain and succeed in school (p. 36). Mothers would also benefit because sending their children to school would allow them to work and earn an income, which is difficult to obtain without this resource (p. 35). Families would therefore benefit in that the mother's income would help to reduce their income problems (p. 34) and increase the possibility that they could acquire essential goods to increase their quality of living (p. 4). The education system would also profit from it because it would be more efficient and less wasteful (p. 3). The market would benefit because it would expand its workforce as more women enter it (p. 13). Finally, children would have a chance to acquire the values that their "unschooled" mothers and unstable family situation could not foster:

> It is essential to provide early educational socialization for these children, because of the instability of their family units, the young age and lack of formal education of their mothers, and the need to change the outlook, norms, and values of such children; this is possible only if action can be taken on their education, beginning at four years of age. (WB, 1998b, p. 68)

In this quotation the WB assumed that the family environment in which children grow up needs to be aided or even substituted by a school environment that is apparently more beneficial to their development. It is interesting that school education is portrayed as more valuable than family education and that "unschooled" mothers are identified as incapable of transferring worthwhile values and norms to their children.

Other relevant themes throughout the documents included good management, equity, efficiency, and quality of education (IDB, 1994, p. 11; IDB, 1997, p. 3; WB, 1998b, p. 4). The authors suggested that the "improved" educational system that would result in accordance with the market should pay attention to these practices. Students under this system would have more employment opportunities and improved performance; employers would have a more significant contribution to the national economy. Accordingly, the WB Argentine project depicted itself as an investment that was created by using human capital theories as a base. It suggested that in investing in human resource development, the country ensures jobs, eliminates poverty, and fosters growth: "Investment in long-term human resource development is the key to sustain growth, reduce poverty and improve international competitiveness" (WB, 1998a, p. 3). The WB analyzed its perspective on education as an investment by using financial calculations and the techniques of cost-benefit analysis. The analysis projected that the costs of problems such as delinquency, crime, and other bad behaviours would diminish because schooled children are less likely to display this type of conduct (p. 16).

Programs. The WB study proposed a government program of school expansion with community participation and support (Bray, 1996, p. 16); however, Bray pointed out that the government should mediate this participation to ensure that all community groups benefit equally (p. 14). The IDB proposed a program of educational reform designed to contribute to the nation's development that would include the participation of all stakeholders involved in the educational system, but recommended that the initiatives always start locally. The IDB's role would be that of facilitator rather than enforcer, for, "as education becomes a priority of governments and society, and as innovation proliferates, the IDB is uniquely positioned to play a role in collecting, systematizing and disseminating the good practices in the field of education reform" (de Moura Castro et al., 1998, p. 20).

The Uruguayan project introduced a new model of education identified as "the new pedagogical single shift (full-time) model" (WB, 1998b, p. 2). It consists of the provision of a daily educational service of seven to eight hours of school to preschool and elementary education children. The authors explained that the current four-hour service is inefficient; it does not provide students with the opportunity to acquire strong cognitive skills and develop significant academic attainment, and, most important, it does not allow mothers time to work: "Mothers will also benefit directly by being able to work, at least part-time"

(p. 13). There is no discussion of social costs. Diminishing the familial and parental/child bond, and developing the child into a human producer, rather than a human being is not considered a problem. Children do not have a chance to be children under this perspective. They are taught to work from a young age and are made into workaholic nationalists: good citizens. (p. 13)

The WB's Argentine project introduced a new type of education at the secondary level called "polymodal" (WB, 1998a, p. 2) that has a curriculum for Grade 10 and 12 students that includes traditional and technology-oriented disciplines (p. 2). This would give students the opportunity to either further their studies to a higher level or enter the labour market after Grade 12. The WB suggested that a polymodal education would better satisfy the needs of the market for better qualified workers (p. 2).

The IDB's projects proposed programs of educational reform. The Panamanian project defined it as the "modernization of Panama's education" (IDB, 1997, p. 3), with special attention paid to the organization, administration, finances, and private sector of education (p. 4). This program supports the newly reformed education law (law 34), changed in 1995 to improve the relevance, efficiency, and equity of education (p. 2). The Argentine project calls it the "Education Reform and Investment Program" (IDB, 1994, p. 3). It is intended to improve the quality and availability of social services for low-income populations and redefines the structure of preprimary education: Children start at the age of three (p. 3).

Techniques. Bray (1996) pointed out that to stimulate community participation, the government has to design a series of incentives such as "long term operations, promise of ultimate government take over, provision of personnel and materials, matching grants and taxation incentives" (p. 21). Bray acknowledged the insecurity of opening and maintaining a community-funded school and suggested that this is a strategy to give confidence to and reward the efforts of those involved.

In the IDB study de Moura Castro et al. (1998) identified five challenges to the system: institutions, information, teachers, technologies, and finance (p. 14). The authors recommended that these challenges be solved through innovation, training, and the development of standards, incentives, career regulations, information technologies, and mechanisms to promote better accountability and performance and that the government assume a new, "stronger role in norm-setting, policy design, information and evaluation" (p. 15). Regarding hard technology, de Moura Castro et al. recommended that traditional teaching be aided by distance education by using radio, television, and computers in cost-effective ways (p. 14)

The Uruguayan project considered the full-time school model, together with universalized preschool education, as means of addressing problems with quality and efficiency (WB, 1998b, p. 3). As I discussed earlier, quality of education is defined as the lack of a link between the education and training received and the needs of the market. The WB's Argentine project uses cost-benefit analysis as a technique to estimate the worthiness of investing in education and, consequently, to achieve the goal of efficiency (p. 16). Other techniques to improve the efficiency, relevance, and resources are synchronization with government policies and with ongoing secondary education projects (p. 13), participation of the private sector and the community, and institutional strengthening (p. 14). The IDB project suggested community participation as a means of achieving the efficiency and relevance objectives, whereas the Argentine project suggested changing the government role to one of more sharing in terms of funding responsibilities, greater accountability and administration, and more and better flows of information (IDB, 1994, p. 7).

2000 to 2006: Emphasis on Poverty Alleviation and Anticorruption

Context

Failing to fulfill their promises, the multinationals began the second millennium with the imperative of analyzing their mistakes, implementing reforms, rebuilding their legitimacy, and setting new goals (Stiglitz, 2002). This led to a reconsideration, at least in rhetoric, of the importance of homemade policies:[23]—policies made from the community's, other NGOs', and local stakeholders' perspectives; policies and programs for vulnerable populations;[24]

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[23] The WB stepped back (at least in its discourse) and encouraged indigenous policies. The WB's role was then reduced to pure financial and technical assistance and to sharing the experiences of other countries.

[24] Such as the policies and programs to alleviate poverty and to reduce inequality (WB, 2006e).

policies for sustainability;[25] and policies for better management, administration, and evaluation of the government's activities.[26]

Part of these types of policies were the MDGs, which were agreed on at the beginning of this decade, in April 2000, when multinational institutions met at the Dakar World Education Forum. There they agreed on many issues with regard to global educational needs and implemented the goals to address these issues. Among the goals were Education for All by 2015 and gender equality in access to education by 2005 (WB, 2004c). This multilateral, international commitment to education for all people and the fervent drive toward universal education was based upon the notion that education alleviates poverty and increases empowerment (UNESCO, 2001). The link between education and prosperity was stated clearly and openly within these goals (WB, 2006a).

James Wolfensohn continued to be in charge of the WB until 2005, when Paul Wolfowitz, appointed by George W. Bush, took over the leadership of the WB until June 2007. Paul Wolfowitz played an important role in the implementation of WB policies for development, but he was also a key player in Bush's antiterrorist policies after the 9/11 attacks. The WB and IDB made certain that James Wolfensohn and Enrique V. Iglesias overlapped decades to ensure continuity in the policies of the 1990s until at least 2005. Perhaps the most important difference in the 2000s was the increasing emphasis on their character as possessors of expert knowledge for development and poverty reduction.

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[25] Sustainability emerged as a response to the criticism that development should not be continuous to avoid less prejudicial effects on the environment and, consequently, on humans. Thus the Bank arrived at the idea of achieving a level of development and then creating the means to sustain it rather than dropping it or continuing it.

[26] Government activities were identified as highly prejudicial to the intended results of the programs because of corruption and other practices encouraged by a lack of proper accountability (WB, 2006).

The WB's (2006b) mission, which encapsulated its approach to development during this decade, is "to fight poverty with passion and professionalism for lasting results. To help people help themselves and their environment by providing resources, sharing knowledge, building capacity and forging partnerships in the public and private sectors". The IDB's (2006a) mission is "to contribute to the acceleration of the process of economic and social development of the regional developing member countries, individual and collectively", and its goals and priorities are "to promote poverty reduction and social equity as well as environmentally sustainable growth".

I analyzed six documents for this decade: a WB publication titled "Achieving Universal Primary Education by 2015: A Chance for Every Child" (Bruns et al., 2003) and two PADs, one for Mexico (WB, 2005a) and one for Brazil (WB, 2004e); as well as an IDB publication about the MDGs in Latin America and the IDB Support (Jarque, Bouillon, & Ferroni, 2005) and two PDs, one for Mexico and one for Honduras. Their perhaps more dominant themes were efficiency, accountability, information systems, school autonomy, participation, and education as a means of combating poverty—the central theme in all of them. The following sections analyze this in further detail.

Mexico. Politics in Mexico during the 2000s were characterized by the conclusion of the one party dictatorship of over 70 years.[27] The PAN began to gain popularity with the candidacy of Cuauhtémoc Cardenas[28] in 1985. Despite Cuauhtémoc's popularity and the successful leftist campaign, the powerful PRI managed to manipulate the results and take the win away from Cuauhtémoc. By then the population had had enough of the PRI's corruption, but Salinas's neoliberal policies (which h including joining the OECD and signing NAFTA) created a façade of economic growth (Kirkwood, 2005). This lasted until the collapse of the peso and the subsequent crisis at the end of his presidency in 1992 (Wilson, Saunders, & Gerad Caprio, 2000).

Ernesto Zedillo, again from the PRI, was the appointed replacement for Salinas. In 2000 the PRI's control ended when the PAN candidate, Vicente Fox, took the presidency under the banner of change (Klesner, 2001). But Fox, despite the promised change, adopted even stronger neoliberal policies, continued to open doors to transnational trade, reduced export taxes and barriers to foreign products, fostered privatization, and requested further loans to keep the country afloat. Felipe Calderon, also from the PAN, replaced Vicente Fox in 2006 and continued, more aggressively, to implement neoliberal policies.

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[27] The PRI (Institutional Revolutionary Party) managed to keep itself in power by, among other things, manipulating the elections, controlling the media and money for the campaigns, keeping a majority in the political cabinet, and controlling the resources of all the parties.

[28] He was the son of the most liked and remembered president of Mexico from the 1930s. People sympathized with him because of the economic stability and oil expropriation during his presidency.

Brazil. Henrique Cardoso, the fourth civilian president of Brazil from 1995 to 1998 and from 1999 to 2002, used moderate neoliberal policies. His reforms to the constitution, among other things, allowed him to be reelected for a second term, which had previously been forbidden. Although his strategy to diminish hyperinflation seemed successful at the beginning of his government, the end of his second term left the country as unstable as it had been at the beginning (Faro de Castro & Carvalho, 2003). His tenure as president was much like those of his Mexican contemporaries, Zedillo and Fox: characterized by a period of neoliberal reforms as he sought to recover the trust of international actors such as the WB and the IMF, which subsequently supported his reelection and his development policies. His failure to control inflation and reduce the public debt hurt his popularity and, in a way, contributed to his party's loss in the next elections. Luiz (Lula) Da Silva from the Workers Party (PT) was the successful presidential candidate during the 2002 and 2006 elections. Lula is part of the recent leftist swing of the political pendulum in Latin America, and he has advocated poverty reduction policies through a program called *Fome Zero* (Zero Hunger; Faro de Castro & Carvalho, 2003).

Honduras. Politics in Honduras during the first decade of the new millennium have been marked by austerity policies as a result of a long trajectory of poverty, corruption, and mismanagement. Some events that have taken place during this decade are the classification of Honduras as a heavily indebted poor country[29] ([HIPC] Central Intelligence Agency, 2007), the aftermath of Hurricane Mitch in 1998,[30] the anti-*mara* (organized gangs) movements and the subsequent jail problems during Maduro's government, and the influence of the US in Honduran politics. Important players during this decade have been Carlos Roberto Flores (president from 1998 to 2002) and Ricardo Maduro (president from 2002 to 2006). Maduro's term was marked by the kidnapping and murder of his son Ernesto by *mara* members. He became a strong activist against them and started a foundation, FERMA,[31] in his son's memory with the slogan "Education for Life" (Centro de Investigaciones de Relaciones Internacionales y Desarrollo [CIDOB], 2007a). Riots and disasters occurred in the overcrowded jails (filled with suspected *mara* members), which caused some to question Maduro's legitimacy and obscured his popularity.[32]

Maduro's tenure as president was also best characterized by his loyalty to the government of George W. Bush. In 2003 Maduro sent 370 soldiers to Iraq to fight in the American war on terror. The soldiers were withdrawn in 2004, and in 2005 Honduras received $215 million for investment from a US program called the Millennium Challenge Account (CIDOB, 2007a). Maduro also signed a free trade agreement (CAFTA-RD) with El Salvador, Nicaragua, Guatemala, Costa Rica, Dominican Republic, and the US.

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[29] HIPC benefited from debt-relief agreements. Honduras received this classification because it is considered the third poorest country in Latin America after Haiti and Nicaragua. As an HIPC, a portion of Honduras's external debt was cancelled during Maduro's term.

[30] This hurricane left 6,600 dead, 8,000 missing, 12,700 injured, and thousands of others otherwise affected (CIDOB, 2007a).

[31] FERMA means Fundación Ernesto Ricardo Maduro (Ernesto Ricardo Maduro's Foundation).

[32] Families of *mara* members claimed that the "accidents" were the hundreds who had died in jails, which had to be investigated. They were not happy with the anti-*mara* policies because they incriminated innocent people, violated the human rights of everybody, allowed hatred crimes to occur against *mara* members, and did not solve the problem; on the contrary, they strengthened the *mara* activities.

Analysis of the Banks' Agreements With Mexico, Brazil, and Honduras

Mentalities. These projects saw education as a service that the state provided with the active participation (financial and intellectual) of parents, community, school administrators, and teachers. Given that a significant number of individuals go to school to acquire the knowledge and skills necessary for life and/or work, the projects and publications stressed the necessity of making the move through school as fast as possible (IDB, 2005b, p. 8). Efficiency is a crucial element of education because it is assumed that if students learn quickly and spend as little time as possible at school, educational resources will be available for more children (IDB, 2005b, p. 31; Jarque et al., 2005, p. 6). Access to education becomes increasingly important in a world where education confers the credentials to exit poverty. These projects have definitively portrayed education as the institutionalized means of acquiring knowledge to enter the job market and as the formal credentials that legitimize this knowledge.

Programs. The major program of the Honduran project is the Poverty Reduction Strategy (PRS), which is related to the educational reform project. This strategy is a condition that allows Honduras to be part of the HIPCs (IDB, 2000, p. 4) and to receive special funding considerations. The WB (2004b) Brazilian project has a multisectoral assistance program that is consistent with other WB and government objectives for quality improvement (p. 3). The IDB Mexican project Human Opportunities includes the program Education, Nutrition, and Health. The WB Mexican project proposed a quality improvement program.

Techniques. Although in previous decades scholarships for children were allocated through schools or other government institutions, in this decade that allocation goes directly to schools, or even families or children, without intermediaries. As the WB (2005c) project for Mexico indicated, "Money gets straight to the end-user" (p. 10). This technique was an attempt to eliminate corruption or fund deviation, crucial factors in the failure of this type of incentive in the past. Implementing academic and nonacademic conditions to maintain the scholarship is a remarkable technique that these programs use. Children and families are required to meet specific standards to continue to receive the funding. In turn, this changes not only their academic activities, but also their social and cultural practices. For example, in the IDB project for Mexico, children must attend school regularly and attend medical appointments every two months to ensure that they are in good health and to receive vitamins and food supplements. Their mothers have to attend workshops to learn literacy, cooking, cleanliness, reproductive health, and skills related to family management (p. 18). The extent of the social and cultural changes can be determined only after proper research is conducted. The WB (2004e) project for Brazil also mentioned the transfer of resources directly to schools that have the projects so that "they can prepare subprojects that are relevant to the communities they are servicing" (p. 18).

The use of indicators takes into consideration even the most seemingly insignificant variables. This type of rationalization ensures that no detail escapes the management of the government and funding agencies, which gives them more control over the activities of funded individuals and ensures that the desired changes actually occur. As the IDB project for Honduras mentioned, the measurement, supervision, and evaluation techniques are more carefully implemented. In addition, the Brazilian project mentions the necessity for "operational standards" (WB, 2004b, p. 19) to ensure benefits for the poorest segments of the student population.

Another issue that was an acute concern in all of the documents was the number of students who repeat years and the strategies to solve this problem. In the WB publication "Achieving Universal Primary Education," Bruns et al. (2003) recommended avoiding repetition as a method of achieving universal primary education (p. 65) assuming that by passing children they would not only achieve this goal but also ensure learning. The Pernambuco project for Brazil referred to repetition as an "age-grade distortion" (WB, 2004b, p. 23). The strategy is to improve efficiency and, consequently, the quality of education by ensuring better trained teachers; better infrastructure; better didactic material; better technology; better control of resources, people, and knowledge; better teachers' salaries; and better contributions from traditionally passive actors (such as parents and community members; Bruns et al., 2003, p. 67; IDB, 2000, p. 7; WB, 2004b, p. 28; WB, 2005a, p. 4).

Analysis of Changes per Decade

This chapter has explained the notions of education for prosperity at the international level and their historical development. I have shown that international policies and ideologies in Latin America have changed from the 1960s to the present day. The current understanding of education has shifted, moving from a perspective on education as a training process designed to address the needs of the field and industry, as the Colombian and Salvadorian projects showed (IBRD, 1968, p. 12; IBRD, 1969, p. 20), to a perspective as the ticket out of poverty, as more recent documents have confirmed (IDB, 2005 b, p. 31; Jarque et al., 2005, p. 6; WB, 2004b). In the following paragraphs I summarize and analyze the changes that occurred.

In the 1960s education was not broadly problematized in the documents because the banks had just shifted their focus from infrastructure reconstruction to social sectors and were paying little attention to education. They envisioned education as mainly training for individuals to serve industry and agriculture (IBRD 1968, p. 12; IBRD 1969, p. 20). The focus on agriculture diminished later as industry grew through the spread of the policies and practices of the international division of labour in Latin America (IBRD 1969, p. 5).

Education was subtly linked with matters of national development, considered beneficial for the nation (IBRD, 1968, p. 2), but the notion of human capital, which conceived of education as an investment for the individual, was absent from these documents. Poverty was an issue, but not one associated with education. The emphasis was on terminal levels of education below university (IBRD, 1969, p. 9). Despite the availability of cost-benefit analyses and tools developed in the 1960s by scholars such as Gary Becker from the field of economics to calculate the effects of education (Resnik, 2006, p. 191), in these documents there is no identification of accounting measures to justify investment in a specific sector.

During the 1970s education began to receive attention; the Latin American region received the first loans, but they did not focus on anything beyond the creation of more schools, which showed the banks' difficulties with changing their focus from physical infrastructure to programme lending. Influenced by the poverty-elimination approach of McNamara, the president of the WB after the Vietnam War, publications began to suggest that education could help to address poverty (Coombs & Ahmed, 1975, p. 3); however, this idea did not spread to the PADs. Concern was still evident in the PADs about expanding the system of secondary and vocational education to address the needs for technical manpower.

Returning to the emphasis on technical education during this decade (IBRD, 1972, p. 2), I want to point out that it is consistent with the spread of the international division of labour policies and practices in Latin America. This decade saw the move of international corporations to Latin America, which consequently required skilled manpower to work in the industries that they set up (O'Brien & Williams, 2004). Significant migration from rural to urban areas was also a consequence as people tried to avoid the devastating effects of poverty in the countryside (Martin & Wasserman, 2005). It is interesting from a discourse analysis perspective that the justifications for vocational and secondary education do not address the banks' commitment to the market.

Nonformal education is considered an important means of transferring knowledge in areas where there were no formal educational institutions (Coombs & Ahmed, 1975, p. 8). The validity of informal education shows that the human capital approach, which prioritizes credentials, was still not in use. Low-cost technologies; nonformal, military education; and better training for teachers introduced concerns related to the process of education and not merely to infrastructure and the expansion of the system (p. 157).

By the 1980s education took center stage in the banks' agendas, and they addressed some of the policy vagueness of the previous years (Aklilu et al., 1983). Influenced in part by the increasing economic crisis and the recession that was affecting the developing world (Fraga, 2004), the policies of education veered towards overcoming the social and economic problems of nations. The funding of education and its sources began to be problematic; questions about who took the most advantage of education, who should take responsibility for its funding, and what level of education should be funded are evident in all of the documents (Aklilu et al., 1983; Furter, 1980; WB, 1983, 1984).

Concerns about the administration of the system also entered the dialogues on education. The publications, although not yet the projects, considered education the engine for the alleviation of poverty and the path for development

(Aklilu et al., 1983, p. 14; Furter, 1980, p. 32). They associated poverty with what they classified as problematic within the system of education, and they strongly hinted at and justified the need for primary education. They presented it as the level with the most significant rate-of-return for nations (Aklilu et al. 1983, p. 14). Since this time advocates of primary education have managed to make this level of education the banks' priority. They have argued that nations that invest in higher levels of education when lower levels of education have not been completed contribute to social inequality by funding education levels for groups of the population that are better off (p. 14). Prioritizing funding for elementary in this and later decades almost contradicts the developmental agendas of the banks, especially when the value of education (for all levels) was increasing and employers (as pointed out in chapter two) decided to raise the competition bar by setting higher education requirements (Robertson, 2005).

SAPs also influenced the way that education was conceptualized and practiced during the 1980s. SAPs not only increased the discussions on economic relevance, equity, public-sector spending, decentralized funding for education, and privatization, but also served as a way to foster user charges in education for levels that did not yield returns to the nation (Bøas & Mc Neill, 2003, p. 66; Fraga, 2004; Gavin & Rodrik, 1995). Although the policy discourse on austerity in education highlights the need to achieve equity through educational opportunities, authors such as Phillip Jones (1997) have pointed out other motives for their adoption:

> Structural adjustment, it must be remembered, revolved around this overarching goal of keeping foreign-exchange loan repayments on schedule and generally required a set of domestic policy reforms that addressed deteriorating terms of trade, changing international relative pricing and falls in the net inflow of foreign capital. (p. 123)

Jones also contended that in developing countries characterized by a strong military and a protectionist state, education spending was at the forefront of the cuts (p. 124).

Throughout the 1990s the economic and administrative aspects of education became paramount. Even though prior documents had emphasized the economic side of education, it was not until this time that the banks managed to align all of the actors and conditions in the same direction. Some of the new actors were the parents and community (Bray, 1996, p. 16; de Moura Castro et al., 1998, p. 14), and some of the conditions were funding, administration, and accountability. The participatory role of new actors was justified as a way to monitor and make the system of education more democratic. Some aspects that were never pointed out were that the monitoring and participatory process worked around standards set from upper levels of government, which made the democratic attempts nothing less than political discourse (Jones, 1997, p. 118). The new funding rules were justified as an attempt to make the allocation of resources more meritocratic and based on cost-benefit calculations, Gary Becker style (WB, 1998, p. 16). What is never mentioned is that funding for education and the meritocracy argument were used as mechanisms of control to ensure the smooth transition of the reforms. This means that standards to determine who has higher qualifications in the meritocracy, although portrayed as neutral, scientifically calculated, justified procedures, are created under a set of principles and biases developed by policy makers. These principles are sometimes set to meet market needs and to protect the private interests of the groups in power (Foucault, 1984a, p. 199). The administration focused on decentralizing, ensuring good management, and promoting equity, efficiency, and quality (IDB, 1994, p. 11; IDB, 1997, p. 3; WB 1998, p. 4). Decentralization promised to transfer the administrative responsibilities of the government to education, to the different localities, schools, and participants directly involved. Consequently, good management resulted from a need to ensure that the new actors who were involved in the administration were able to play a responsible role (de Moura Castro et al., 1998, p. 20). The hidden aspects of these two were that the transfer of responsibility focused on the funding (leaving the control of the administration and program design in the hands of higher ranking dignitaries), and the good management controls applied only to the actors who were directly involved. This meant that international and national governments continued to control the rules while claiming that the processes were democratically controlled at the grassroots level. Jones (2007) explained, "What remained in no doubt were the fundamentals of Bank policies and operations. Despite all the external relations pressures on Wolfensohn, the Bank continued to function along traditional lines" (p. 197). Last, the claims of quality and efficiency have been based on the argument that teachers were poorly trained, schools scarcely equipped, programs badly designed, and resources poorly managed. This has concealed the fact that quality and efficiency are often measured in relation to standards foreign to the education systems being reformed.

Jones (1997) described the documents created during this epoch as "more concerned with the preconditions for educational development than with the core matters of educational processes themselves" (p. 126). The documents (publications and PADs) that I analyzed are consistent with this perspective in that they described education (including preschool) as an investment that ensured jobs, eliminated poverty, and improved international competitiveness in the global market. The notion of human capital and education as a direct benefit to the individual entered the discourse during this time. Little was said about the delivery, pedagogical, or program design aspects of education.

The direction that the publications and PADs took from 2000 to 2006 is openly and directly focused on poverty alleviation. Direct incentives to encourage children to go to school and the involvement of their families, who are encouraged to change their lifestyles to achieve the goals of the system, are also innovations that were fully developed during this decade and tactics to target the poor directly (IDB, 2005b, p. 17; WB, 2004b, p. 18; WB, 2005a, p. 110).

Efficiency, management, decentralization, and community participation remain as in the 1990s. Perhaps the only noticeable difference between this and previous decades is the discourse of education as a benefit primarily to the individual and secondarily to the nation (IDB, 2000, p. 30; IDB, 2005b, p. 10;

Jarque et al., 2005, p. 10). That is, education is considered human capital, a commodity to serve the individual first. Another difference is how multinationals concede to having made past errors, which transforms their discourse to a more reflective exercise on past mistakes and willingness to listen and consider local input.

It is interesting that the development agenda did not change significantly despite the local input, which may be a result of the reproduction of past goals and practices. This can be explained by considering that the players in the field had been exposed to the banks' mentality and developmental goals for education for more than 15 years and had internalized and reproduced them. In my master's thesis I demonstrated that university professors and administrators adjusted their mental schemes to institutional rules as a way of surviving in a system that was set up to work under those rules (Ocampo, 2003, p. 128). The professors internalized the goals and the rules of varied funding techniques and reproduced them, not because they necessarily believed in them, but because they wanted to preserve the capitals that they had been able to accumulate by accepting those funding techniques (p. 129). In the theory section of this thesis I explained that Bourdieu (1990) described this event as an adjustment of the habitus, whereupon individuals build their perceptions according to historical and contextual conditions (p. 54). A full study is required of the extent to which the habitus of the actors within the field has been adjusted to the human capital approach that was promoted in the past. Further investigation is also required to determine the reasons for the lack of change, if indeed little changed in the core developmental goals of the banks. It is my intention to undertake such a study as my first research project as a faculty member. For the time being, I rely on other studies that have examined why techniques of governance remain almost unchanged even after being transferred to different players. Based on the work of Bourdieu, I speculate that the historical exposure to this approach and the accumulated capitals played an important role in the internalization and adjustment of the participants' mental schemes to past policy perspectives.

Conclusion

In this chapter I have explained how the current definition of education has been shaped historically. From a general point of view, it is safe to conclude that the international definitions of and approaches to education have indeed changed, if not in substance, at least on the surface. From the summary above, it is obvious that recent policy documents have recommended education as a means of combating poverty. However, the perspective on education as an investment, which is another side of the human capital theory, has remained a constant characteristic of all of the banks' documents. This is not surprising considering that these institutions are banks and, as investors, do business where they can obtain a return. The new approach is then not about investment in education, but about the objectives of that investment. Earlier documents emphasized that education worked as an investment for the nation, whereas the latest have stressed that it is primarily an investment for the individual who receives an education, and then for the nation.

Changing the focus of the subject or entity that benefits from investment has changed the capability to measure the results and characteristics of the policy. It is easier to measure the impact and success of the investment on a per-individual basis than on a per-country basis. Assessments on a per-individual basis further enhance the ability to exercise long-distance control (Edwards, Ezzamel, & Robson, 1999; Foucault, 1984a; Rose, 1991). A more quantifiable project would increase the accountability of the investment and the governability of the population being measured (Rose, 1991). It would also satisfy the expectations of the stakeholders who are interested in concrete and reliable numbers, improve the banks' image as socially responsible entities, and make development targets such as poverty reduction easier to account for.

These individualizing techniques represent not only attempts to change the focus of the policy from a national to an individual perspective, but also social and economic forces that contribute to the adoption of the human capital approach. Another objective of this study was to discover the forces that contributed to the generation of the current notions of education. Throughout the analysis I showed that, gradually, international policies for education have adapted to an economic system that prioritizes efficiency and economic values. I believe that the individualizing techniques were a significant turning point in the adoption of the notion of education for prosperity. It was the focus on the individual the technique that eased the establishment of the poverty-reduction policies. It was the banks' loss of legitimacy in the 1990s, one of the most powerful reasons to focus on poverty reduction, because this goal gave them an image of social responsibility. This same image helped them to justify their subsequent operations in poor countries.

Another objective of this study was to shed light on how policy flows. In chapter two I talked about how different stakeholders in different hierarchies inform and form policy. In this study I was able to see a flow of policies and ideas from the publications, carried out by bank officials, to the PADs designed by country representatives with the technical support of bank officials. Because of the lack of data (primary sources, interviews, etc.) from country representatives to discover in more detail the extent of the banks' influence in the process of policy formation, I can only conclude that, according to the characteristics of the publications and the PADs, it seems that the PADs followed the steps marked by the publications. This pattern of ideas, starting with the publications and spreading to the PADs a few years later, is consistent throughout the documents that I reviewed, which partially shows that the publications advocated the theory that the PADs converted into practice later. The publications were research documents with reform prescriptions for worldwide application. The PADs attempted to address the needs of a specific country, in collaboration with country representatives, to solve local problems. Finding the ideas of the publications evident in the subsequent PADs shows that locally made solutions were already designed at the headquarters. This also reveals information about the source and flow of policies as a space of control. In this case, the ideas are created at a center location (WB and IDB offices) and later spread into distant territories (individual countries). As I pointed out earlier, Edward Said (1993) identified this practice with imperialism, which he defined as "the practice, the theory, and the attitudes of a dominating metropolitan center ruling a distant territory" (p. 9).

Finally, I want to point out that, besides the broader emphasis on poverty reduction and the focus on the individual as the primary benefactor of the policies for education found in later documents it is evident that the banks, specially the WB, consolidated their reputation as expert banks willing to act socially responsibly. The WB's expertise consisted of having a bigger knowledge base with sharing capacity, with a highly rationalized system of funding allocation, and with strengthened mechanisms of government and control. The following chapter looks into the development of the human capital perspective at a national level. Will the policy flow and influence carry on to the national level?

CHAPTER 4:

PEELING OFF THE LAYERS: AN ANALYSIS OF MEXICAN EDUCATIONAL POLICIES FROM THE 1970s TO 2006

Introduction

As poor nations continue to struggle with economic limitations and other problems derived from their financial conditions, government policies increasingly emphasize the role of education as the panacea for these problems (Wolf, 2002). In the previous chapter I examined the stance of international financial institutions such as the WB and the IDB and pointed out that, since their nascence, they have advocated policies that tie education to economic performance. Although the objective of that chapter was to trace the origins of these banks' views on education and to explain when and how the notion of human capital was created, in the current chapter I address the same subject, but within the framework of Mexican education policies to determine whether there is a link with international policies. Following this, I discuss how education has been conceptualized throughout time. Finally, I will uncover the contextual forces that influence the conceptualizations of education and their changes.

Within this chapter I provide a historical and a thematic analysis of key policy documents that I selected because of their relevance to Mexican education. The historical analysis describes the mentalities, the programs, and the technologies of government that are utilized to address the educational goals during each presidential term. The thematic analysis provides an interpretation of relevant themes that emerged during the research process.

Mexican Education

Prior to the Revolution of 1910, schooling in Mexico was almost exclusively reserved for elite groups and was managed by either the church or various state governments (Zamora-Patiño, 2008). It was not until the 1920s that formal education became a popular government project. José Vasconcélos, the first secretary of public education in Mexico, created the largest federal bureaucratic institution in charge of the management of education. The Secretaría de Educación Publica (SEP), or the Ministry of Education, was a centralized institution that designed and decided the direction of education in Mexico from preschool to university and was in charge of resource allocation, human resource management, and the construction and maintenance of school facilities. Vasconcélos's educational projects had a humanist base, and patriotism was one of the main objectives (Olivera-Campirán, 2008). Inspired by the methods that the missionaries used, he implemented a strategy of teacher crusades to remote areas to open up schools and libraries and distribute books among the population.[33] His nationalist education project was never fully completed because of the political instability during the change of government in 1924; however, he established the basis for a more popular project in education (Olivera-Campirán, 2008).

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[33] During this time the government opened 671 libraries and distributed 200,000 books on classic literature, history, literature for women and for children, and a teacher's journal.

Rural farming schools received special attention during the government of Lazaro Cardenas (1934-1940), whose socialist approach was evident in, among other areas, the self-sustainability method used to run these schools. The Teacher Crusades Program, started with Vasconcelos, became the Cultural Missions Program during Cardenas's government. This government project took Indigenous and peasant groups into consideration in trying to unify Mexico's multiethnic population through a uniform education program (Reinke, 2004).These missions sent teams of social workers, nurses, literacy specialist, musicians, crafters, and teachers to remote locations to train rural teachers, who in turn would be responsible for transferring the skills and knowledge that they learned to the rest of the population. Apart from doing literacy work, the cultural missions fostered artistic activities such as music, theatre, poetry, and crafts. Athletics was also an activity that the missions promoted, and foreign sports such as basketball, baseball, volleyball, and others gained popularity throughout the country (Olivera-Campirán, 2008).

Besides the achievements of the cultural missions, another accomplishment related to education that is worth mentioning is the law of free, mandatory, secular education that was established during this period. This same law reiterated the centrality of education by specifying that the federal government would manage and fund[34] every level of education. Education became, as Leanne Reinke (2004) pointed [illegible] "a political tool of unification and the creation of homogenous national identity (p. 489).

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[34] Only elementary education was to be funded by the state. The other levels were encouraged to seek alternate funding from private, industrial, individual, and other sources.

The centrality of the Mexican system of education has been perhaps one of its most criticized characteristics, and external funders or agencies of technical support such as the OECD (1997) have extensively analyzed the effects of such an amalgamated system. Recent attempts to decentralize education policy have managed to delegate power from the central government to the state governments. However, the programs continue to be designed and controlled from a central location; furthermore, although different types of education have been created, there continues to be a central objective to apply the expectations of the type of citizen to be shaped by education to all school children. I will cite more specific examples of centralization later in this chapter.

Under this highly centralized educational system, education in Mexico expanded its legal bases. The National Programs of Education (NPE) and the different presidential publications on education contained the statutes, rules, conditions, and descriptions of how education should be run. These documents, designed and published by the Ministry of Education (SEP) every six years, are the documents that I devoted myself to analyzing, the results of which I present in the following sections.

Mexico in Relation to Other Latin American Countries

Classified as a developing country because of its level of income or GNI per capita, Mexico is often identified as one of the most vibrant emerging economies in Latin America. Before the financial crisis of 1994, as a result of the adoption of SAPs as instructed by the IMF and other such financial institutions, Mexico became a member of the OECD and signed the NAFTA. Politically, this meant that Mexico was a step away from becoming a developed nation and was strong enough to compete with the most developed economies (Purcell, 1998, p. 111). Shortly after implementing the IMF policies, the development indicators of GDP, GNI, education levels, energy supply, water, education, literacy, unemployment, poverty, and others indicated that the economy was reaching levels comparable to those of rich countries (p. 118). However, the collapse of the peso and the insurgence of the EZLN (a Mexican guerrilla movement) in January 1994 showed that the perceived growth was just the result of an accelerated opening of markets that was neither sustainable nor beneficial to all groups of society (Henales & Edwards, 2000; Purcell, 1998, p. 109).

The crisis of 1994 was perhaps one of the most devastating financial and social events in the history of Mexico. However, various analysts have reported that the recovery has been extraordinary and that Mexico has risen again to be a strong economy in Latin America as it was in the 1970s (Joseph & Henderson, 2002, p. 3). Speculation abounds regarding the recuperation of the country. Some suggest that Mexico recovered because, as a key neighbour of the US, it received help that would also benefit the US (Purcell, 1998, p. 118). Others point out that the recuperation of Mexico was a result of abundant and robust loans from international financial institutions (Castañeda, 2000, p. 66; Joseph & Henderson, 2002). Still others contend that the country in fact managed to recover through the implementation of economic strategies, such as NAFTA, the opening of the markets, and the lowering of trade barriers (Salinas de Gortari, 2002).

Regardless of the validity of these analyses, a standing factor is that the nation continues to embrace developmental objectives and that, statistically, it is a competitive developing nation in almost all of the standards considered in the measurement of development. In fact, the WB has grouped it as an "upper-middle income economy" (2009a).

Table 4 contains the most important indicators of development and education and highlights Mexico's attention to education and alignment with the recommendations of the OECD. Mexico, according to the MDGs, is placing the right amount of emphasis on elementary education, to which it allocated 40% of its total education funding. Government spending of public education accounts for 25.6% of the budget, Mexico's adult literacy rate is almost 100%, and the primary completion rate is 100.

The country's average annual growth, according to the WB (2004c), has steadily increased from 2.8% in 1986 to 3.1% in 1996 to 4.8 in 2006. This places Mexico in a strong financial position as other economies in Latin America such as Argentina and Brazil. Mexico's primary education completion rate has been almost 100% since the 1990s, according to the WB. Similarly, WB reports show that poverty levels have dropped (as per a headcount ratio on the national poverty line) from 20% to 18% of the population (WB, 2004c).

Table 4

Education at a Glance

Indicators of development and education	Percentage
Adult literacy rate	92.0
Primary completion rate	100.0
Education financing	
Public education spending (% of GDP)	5.4
Public education spending (% of government spending)	25.6
Share of education spending by level of education (%):	
Primary	40.0
Secondary	29.5
Tertiary	17.4
Other	13.1

(Adapted from WB, 2007c)

It is important to mention that indicators such as education, primary completion rates, and economic measures such as education funding from the GNI that have been identified as among the most important measures of development are not neutral measurements. Recognizing their lack of neutrality highlights the power, the groups, and the curriculum behind these indicators. One theory that is followed in analyzing the findings of this chapter points out the relationship between power and knowledge. Development, as Peet and Hartwick (1999) explained, includes the objectives of power:

> Development is a complex, contradictory phenomenon, one reflective of the best of human aspirations and yet, exactly because great ideas form the basis of power, subject to the most intense manipulation and liable to be used for purposes that reverse its original ideal intent. (p. 2)

My description of Mexico's relevant economic and educational data and the subsequent historical analysis of documents consider the development indicators in relation to education as the portrayal of a select group of policy makers with particular interests. These interests need to be kept in mind in the data analysis section to better understand the policy inputs and outputs.

Historical Analysis

1960 to 1969

As indicated in my Methodology section, my research was hindered by the lack of available primary historical documents from earlier decades. Because of a relocation of the Secretary of Education's historical archives during the time of my data collection and analysis, PNEs for the 1960s were not available to the public. Primary documents are ideal for this type of research because they are not tainted by any interpretation other than that of the original author. Although secondary sources on education during this decade are available, they do not allow me to make comparisons because these documents have different characteristics; they are works that summarize and analyze the PNEs from perspectives hampered by political bias and historical hindsight. Because I have relied solely on primary sources of information for the following decades, I decided not to use secondary sources for this decade given that I have not used them in the decades that follow.

Luis Echeverria and His Educational Thought: 1970 to 1976

Luis Echeverria Alvarez succeeded Gustavo Diaz Ordaz in the elections of 1970 and governed until 1979. Before becoming president, he worked as the secretary of government during the previous presidential term (Castañeda, 2000; Kirkwood, 2005). His educational plan, entitled "Echeverria y su Pensamiento Educativo" (Echeverria Alvarez, 1974), describes his ideas, objectives, and expectations for education in Mexico. One of the most outstanding features of Echeverria's "Educational Thought" is his emphasis on the subjective characteristics of the individual, which include spiritual, ethical, and cultural values and are evident in his description of educational processes. The following analysis describes the mentalities, programs, and technologies in his plan for education.

Mentalities

Echeverria Alvarez (1974) defined education as "the activity that shapes the men of tomorrow" (p. 57). Even though this initial definition highlights human values such as dignity (p. 61), civics and ethics (p. 63), and spirituality and intellect (p. 64), he also related education to economic development (p. 62). He saw it as a way to train students for work (p. 58) and to achieve civilization (p. 60). His holistic approach to education stressed that it contributed to "the development of moral, intellectual and physical energies of the men and citizens" (p. 66). Education is also considered a way out of poverty, but the arguments on this idea are not emphatic enough to be relevant to my analysis. In discussing this aspect of education, Echeverria pointed out that "better education means less misery, more industrial and field productivity, fair distribution of income and less delinquency" (p. 67). It is interesting that education is also seen as an instrument of liberation of colonial and imperial powers (p. 73), which shows that conquest and independence discourses are still used in political speech a few hundred years later.

The main players in education are students, parents, teachers, and society (Echeverria Alvarez, 1974, p. 60). He described students as youth and viewed them as the future of the country and the main force of development. His descriptions of youth are overwhelmingly romanticized. For example, he identified "generosity, loyalty" (p. 24), "revolutionary ideas, solidarity, unselfishness" (p. 27), "marvelous energy, reflexivity, ambition, constructive revelry" (p. 31), and the desire to participate in change (p. 33) as the main characteristics of youth. Through them, "we find permanent allies in the hard work of development necessary to help us continue ascending towards progress in Mexico" (p. 34). His praises of youth and his emphasis on the importance of young people in the development of the nation are interesting in that they contradict his role in the student movement of 1968[35] (Ordorika, 2003, p. 117).

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[35] The 1960s was an important time for student movements around the world (Altbach, 1989). Mexico was not exempt from student mobilizations. In Mexico in 1968 the conflict between government and university students achieved its peak. Luis Echeverria was the secretary of government and dealt with the protests through military force. Needless to say, this strategy was repressive and resulted in extreme violence in which hundreds of students were killed, disappeared, jailed, or tortured unjustly for speaking out against what they saw as an authoritarian regime (Braun, 1997; Ordorika, 2003, p. 116).

Echeverria led the "*matanza del 68*" (killing of '68). His emphasis on youth is most likely a discourse to make amends for the damage caused in 1968 (p. 124). In fact, a few years into his presidential term he increased the budget of the National University of Mexico by 1,688% and regained to some degree the confidence of students and legitimacy with the university population.

Programs

Achieving progress is the main objective of Echeverria's plan. Progress "is not seen as an end, but as the means to achieve the full realization of the human being" (Echeverria Alvarez, 1974, p. 87). Echeverria advocated educational reform with its main objective the expansion of the system: more teachers, more schools, and more resources (p. 88). The population growth and the limited number of urban educational spaces are problems that his plan endeavoured to solve (p. 90). Another aspect of the reform is the increased number of technical schools, but this expansion, although deemed necessary, corresponds with an increase in the esteem associated with a university education (p. 160). Technical schools had to develop programs that were linked to industry (p. 168) or to appropriate job sites. In summary and compared to other presidential terms, the programs during this term are not as well delimited and appear more like a fantasy about education than strategic plans to solve systemic problems.

Techniques

Under Echeverria's plan, students were encouraged to pursue higher levels of education (Echeverria Alvarez, 1974, p. 28). It is interesting that despite the emphasis on technical education, higher levels of education were not undervalued; on the contrary, Echeverria praised the desire of students to further their education (p. 28). This could also be part of his attempt to recover students' confidence in his government. He also considered extracurricular activities such as theatre, opera, dance, and art (p. 15) vital to the cultural shaping of individuals (p. 195). Remarkably, later presidential education plans emphasized higher levels of education and extracurricular activities less.

Echeverria advocated sending students to study abroad to bring new ideas to the country (Echeverria Alvarez, 1974, p. 132), thus acknowledging that higher levels of education are better in foreign countries. These students could then return to Mexico and bring with them the other countries' knowledge and worldviews. He contended that Mexico must aspire to be more like the developed countries, and, to achieve that end, it should mimic their systems and their techniques.

Echeverria Alvarez (1974), almost in contradiction to his praises of foreign education and his desire to adopt other countries' world views, also promoted nationalism as a means of improving education (p. 47) and, consequently, achieving development (p. 74). He described Mexico as a country of *mestizos* that needs to redefine its identity to achieve development and looked to Indigenous people as marginalized groups who need to be assimilated[36] (p. 154) not only to strengthen the identity of the country, but also to ensure their participation in the development process (p. 89). He considered teaching history a technique to help individuals understand their society and their past and improve their present (p. 119).

José Lopez Portillo: Education for Change: 1976-1982

Jose Lopez succeeded Luis Echeverria from 1976 to 1982. His time in government was marked by a severe crisis as a result of financial mismanagement, corruption, and accumulated financial problems from this and previous governments (Joseph & Henderson, 2002, p. 462). Despite the rapid growth of the oil industry in Mexico during Lopez's term, the country's economy collapsed, and his government is remembered as one of the most corrupt in Mexican history (Castañeda, 1993; Joseph & Henderson, 2002, p. 462). The document that I reviewed for analysis, "Education for Change" (López Portillo, 1976), can best be characterized by its strong advocacy for humanistic values in favour of education as an emancipatory tool.

Mentalities

In "Education for Change," Jose Lopez Portillo (1976) identified education as the tool to achieve change, which he vaguely defined as "the constant truth" (p. 1) and referred to as the main goal of government. There is no information to understand why it is necessary or what exactly should be changing. When change is advocated for its own sake, it becomes a political tool to devalue old practices and encourage the acceptance of new government policies, as Taylor et al. (1997) explained, change is often offered as the only acceptable way to address policy development, and it is an overused idea in political discourse (p. 5). Jose Lopez Portillo's government was influenced by the theories of development with a humanist basis. Poor countries that wanted to achieve development as rich countries measured and described it widely adopted ideas of going forward, progressing, and changing the old for the new (Peet & Hartwick, 1999).

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[36] Assimilation includes making Indigenous people adopt the Spanish language, which is called *castellanization* (p. 14), as well as the *mestizo* values and the culture (p. 162).

Programs

There is no mention of a specific program; rather, López Portillo (1976) vaguely mentions the adoption of change strategies to structure education with "axiological purposes" (p. 7), which help to make a society more just and achieve freedom and democracy. He also proposes that efficiency be increased, not to "help multiply the capacity of exploitation" (p. 9), but to create the necessary conditions to help the marginalized to improve their situation.

Techniques

There is no concrete proposal on how to achieve the objectives for change, and López Portillo (1976) addressed only the following ideas: Change is inevitable, it contributes to justice, and thus it is necessary to find ways to induce it, manipulate it, predict it, anticipate it, and structure it (p. 1). This should be a collective activity (p. 4). Based on Aristotle's ideas that man should find a way to "insert his particular ends to structure change" (p. 5), López asserted that people are, by nature, political beings. It is clearly evident that the document lacks techniques.

Miguel de la Madrid: Education, Culture, Recreation, and Sports: 1984-1988

Miguel de la Madrid replaced José López Portillo in 1984. De la Madrid was the first president of Mexico who had been educated abroad and the first one to implement neoliberal policies in the country. As López's successor, de la Madrid inherited an economic crisis and began to implement austerity policies (Haggerty, 1996). The education budget was cut, which impacted teachers' salaries, school programs, and the organization of the system. His education plan, "National Program of Education, Culture, Recreation and Sport 1984-1988" (Secretaría de Educación Publica Poder Ejecutivo Federal [SEP-PEF], 1984) is best characterized by a holistic approach to the wellness of individuals, including the intellectual, the physical, and the creative aspects of their person. The following analysis looks at the mentalities, programs, and technologies of this plan.

Mentalities

The SEP-PEF (1984) viewed education as a method that "shapes the new man and the upcoming generations" (p. 9). It is therefore a process of formation, not information (p. 10) and an important contributor to political and economic independence (p. 10). Education is where the future of Mexico is decided (p. 35), it is the instrument that will help the nation to strengthen itself (p. 36), and it is a basic necessity for the population (p. 36).

Even though education plays such an important role, the introduction clearly pointed out that it should not be seen as a panacea for everything because it is part of other aspects and institutions of society that together contribute to the betterment of the nation (SEP-PEF, 1984, p. 10). Also, the effects, the process, and the limits of education extend outside the educational institution, which means that education is not a process that occurs only within the limits of the school; rather, education is a "phenomenon that transcends the school ambit. Individuals get educated and receive continuous cultural impacts through their social life; for this reason what the environment [meaning the society] teaches is as important as what the school teaches" (p. 37). This is a very unique definition of learning in what had in Mexico been a highly institutionalized conception and understanding of where learning occurred. Prior to this time, governments viewed the school as the primary place of learning. Informal learning, although recognized, had hitherto been deemed inferior. An important shift in how education was regarded was occurring.

Education is seen as in need of a revolution. Compared to the education of developed nations, Mexican education is considered "delayed" (SEP-PEF, 1984, p. 29). The diagnosis is that too much attention has been given to the expansion of education, and now its contents, its policies, and the administration of it need to be attended to (p. 29). Four aspects are considered important in this revolution:

educational services (p. 19), cultural services (p. 22), recreational and sport services (p. 24), and administration services (p. 25). They each aim at improving the delivery of education in a more comprehensive manner.

Programs

This plan is very specific with regard to the types of programs that it wants to implement (SEP-PEF, 1984). It lists 17 programs of education that are intended to improve the delivery, none of which is directly related to poverty. The first two programs are concerned with the administration of the system; they are called "coordination of the sector actions" and "planning, programming and budgeting of education" (p.74). The third, fourth, fifth, and sixth programs are concerned with the types of education that the government provides: basic (elementary, junior high, and high school), rural and Indigenous, initial and special (for babies of working mothers and for children with learning disabilities), and adult education (to allow adults without schooling to participate in productive areas; p. 75).

The seventh program is about teachers' education; it addresses the need for teachers to have a university degree (SEP-PEF, 1984). Prior to this, teachers in Mexico were educated in "normal schools," which they could enter after junior high; high school was not required. Normal schools gave teachers a specialized high school education rather than a university degree in education. This became a concern in a society that considered university graduates better prepared. It is interesting that there is no research to back up the need for more education or to prove that normal-school education was inadequate. It appears that the decision to pursue further education is made for the sake of accumulating school years to satisfy the perceived but unproven need for university trained teachers.

The eighth is a program for research applied to education (SEP-PEF, 1984, p. 80).

The ninth is a program of decentralization, which was a dominant feature of two presidential mandates during this decade (SEP-PEF, 1984). De la Madrid and Carlos Salinas focused their programs of government on decentralization as a result of an exhaustive analysis in Mexico in 1982 of the challenges of future governments. This analysis, as Rodríguez (1993) noted, concluded that it was necessary "to reduce the patterns of concentration in Mexico City and to move towards a system where the distribution of political and economic power was more equitably balanced across the country and across the various levels of government" (p. 133).

The 10th, 11th, and 12th are programs of higher and technological education and are concerned with the quality of education and research at these levels of education (SEP-PEF, 1984). Regional centers of research and research associations are created under these programs to foster quantity and quality of university research (p. 87). The 13th and 14th programs support cultural and physical education, positing that individuals need to be shaped holistically to improve their opportunities. This includes taking care of their artistic, physical, and intellectual aspects (p. 37). The 15th is a program of expansion. It is interesting that of the 17 programs, only one attends to the needs of expansion, especially because previous presidential plans focused solely on expansion.

The 16th and 17th programs are also designed to attend administration problems to better use human and material resources (SEP-PEF, 1984, p. 99). Perhaps the most outstanding characteristic of these programs is their emphasis on the administration side of education. Education is no longer reduced to infrastructure, expansion, teachers, and students; it is now a process that requires organization, structure, research, and strategy. This is the first program that laid down specific programs to address the objectives of education, although none is directly related to poverty or addresses poverty through education.

Techniques

The strategy to reduce expenses to address the economic crisis of this period affected education through a change in which, instead of teaching by subjects, teachers would teach by areas. That meant that subjects such as history, geography, and sociology were grouped within one area called the social sciences. Similarly biology, physics, and chemistry were grouped within an area called the natural sciences. Grouping subjects in areas saved money for teachers' salaries but did not improve the quality of education because the teachers did not have the training to teach all of these subjects. Fortunately, the government that followed De La Madrid's brought this program to an end in an attempt to recover the better trained teachers for each specific subject (SEP, 1989, p. 38).

Another mechanism implemented during this period was television. A special channel was designed to teach long-distance education (p. 49). Also, the process of decentralization received a great deal of support during this period. Education was linked with employment (p. 53), and a new subject called vocational orientation was introduced to teach students employment options (p. 54). Permanent education (p. 56), or lifelong learning, was introduced in Mexico not only to keep everybody's education up to date, but also to keep teachers' training current with the needs of society.

Carlos Salinas de Gortari: Educational Modernization 1988-1994

Carlos Salinas was the first president of Mexico to fully adopt neoliberal policies of decentralization, privatization, free trade, and debt consolidation (Joseph & Henderson, 2002, p. 41; Loyo Brambila, 1999, p. 54). Salinas's neoliberal government subjected every aspect of the society to economic values and norms. As a result of these same economic policies, NAFTA (North America Free Trade Agreement) became the largest indicator of Mexico's commitment to the neoliberal agenda. Mexico's participation assumed that the country was, or could soon become, a wealthy and developed nation.

A second indicator of Mexico's commitment was its membership in the OECD. Accepting Mexico as a member of this organization that dealt primarily with wealthy nations meant that Mexico was considered a nation with the possibility of being competitive enough in key areas of the economy. But all of this was an illusion that fell with the economic crisis of 1994 at the end of

Salinas's term. the abrupt implementation of open economic policies (reduced tariffs and import tax fees), unrestricted privatization, and decentralization, together with government mismanagement, caused perhaps the most severe economic crisis in the history of Mexico (Castañeda, 2000; Henales & Edwards, 2000).

Carlos Salinas's slogan for his campaign and his government was "Solidarity." His government's main objective was to decentralize power and resources so that the poor and marginalized (geographically and economically) would benefit from the government's resources (Loyo Brambila, 1999; Rodríguez, 1993, p. 139). But this decentralization also served as a method to involve as many member of society as possible in the project of government. It was a way to "share" the tasks of government and spread the responsibility and the successes and failures of the development activities. This showed everybody that their participation could make a difference in the outcomes of every government program (from infrastructure construction to educational projects (Raphael, 2007, p. 90).

Salinas's main government project was focused on modernizing all of the country's sectors. The modernization objective was so dominant that the title of the education plan for this period was Modernization of Education. It was not just a plan for education as in previous periods, but was focused on modernizing (changing) the whole system (Raphael, 2007, p. 89). One of the most important elements of the modernization was decentralization (Loyo Brambila, 1999;

Rodríguez, 1993), which, as the following analysis reveals, produced interesting reforms in the system of education.

Mentalities

Salinas's project defined education in the NPE for this period as "an arm of justice and as an exceptional instrument for the economic and political development of Mexico" (SEP, 1989, p. i). It is "the only instrument that shapes the historical and cultural values of the nation in the youth" (p. i) and the instrument that trains youth for work, for public service, and for artistic productions (pp. ii). It is the means to achieve nationalism (p. vii), to build a competitive nation (p. xiii), to acquire skills for work, universal values, and skills to improve the quality of life (p. 4). It is also "the motor in the generation of new ideas and attitudes. . . . It should encourage a productive structure, efficient, supported by scientific and technologic knowledge" (p. xiv). It is strongly associated with poverty alleviation (p. 30). This last definition of education highlights human capital as its basis and adopts a perspective on education as a means of combating poverty (p. 30).

The project presented education as a means of obtaining respectable and well-paid jobs (SEP, 1989, pp. iv, viii), but did not describe it as a process that occurs within a school institution; in fact, this NPE introduced different methods to credit knowledge gained outside school. Thus, schooling is not as important as learning and the methods to validate the latter. Learning, in turn, is "a process of experience that involves learning to be and learning to do" (p. 21).

Before studying the programs implemented during this period, I would like to point out that an important characteristic of this education program is its participatory approach. This is the first program that claims to have held a national consultation that identified the main challenges of education (SEP, 1989, p. v). Whether truthful or not, this claim highlights the significance of decentralization from top government programs such as the one studied here to local micro programs and plans developed in schools.

Programs

The main program of this NPE was its modernization program. Modernization is described as an inevitable and indispensable process (SEP, 1989, p. iii). The characteristics of a modern educational system are a deep transformation of schools, teaching, research, and the role of everybody (p. iv); a more rationalized financial system; better mechanisms of administration (p. 14); systematization of actions (p. viii); a new scientific and technological culture (p. viii); a new relationship between government and society in which society is more participative (p. xii), and "more and better education for all Mexicans" (p. 16). Modernization "implies solidarity as an attitude" (p. xii); reduces inequalities (p. 18); is committed to productivity (p. 18); stands for democracy, justice, and development (p. 19); seeks to protect the environment and health (p. 40); and is an attempt to serve a broader sector of society (p. 44).

This program was the first to link health and nutrition with good education (SEP, 1989, p. 51). It also addressed preschool education, which starts at nine months and finishes at the age of five. For toddlers, it is not just daycare, but an actual school-style program in which they are taught manual skills and civic values. Besides training toddlers for school, it gives their mothers a chance to participate in the labour market (p. 45). The schools that provide this type of informal education are called Centers for Children's Development and were first introduced in Mexico during Salinas's presidency. Coincidentally, my analysis of the international trajectory of education also shows a strong emphasis on this type of preschool education in Uruguay and Argentina during the 1990s (WB, 1998, p. 13), which demonstrates that this is when women's participation in the economy was recognized as important and necessary in Latin America. Perhaps the most noteworthy reform that resulted from this understanding of modernization was the more rationalized financial system that introduced financial mechanisms to control all activities.

Salinas's presidential term introduced for the first time a decentralized scholarship program, PROGRESA (Program of Education, Health and Nutrition), to allow children of poor families to go to school. Its objective was to eliminate what were identified as barriers that prevented children from attending school and succeeding therein. Some of the barriers were economic—the lack of money to send children to school—food, and health. The food and health component suggested that undernourished and unhealthy children do poorly in intellectual activities. PROGRESA offered monetary scholarships, food stipends, and health services to targeted families to ensure that their children would complete school and, in so doing, helped them out of poverty (SEDESOL-Oportunidades, 2005).

Techniques

Several techniques were proposed to achieve the goals of modernization and the decentralization of education; I will discuss some of the most important. The first one is the participation of everyone, to which the document referred as a constitutional responsibility (SEP, 1989, p. 3) of the community members. Teachers have a central role; they are "the base of the transformation that will change the face of education" (p. xiii). Therefore, it is important to improve their benefits, but also their knowledge and the structures used to promote them in such a way that they will follow a meritocratic logic (p. 21). Parents' participation has also acquired new characteristics. They are invited to participate in specific tasks in the educational process in a more active and formal way (p. 37).

Another technique is the universalization of elementary education (SEP, 1989, p. vii), a method of increasing the equality of opportunities for everyone (p. 23). The plan considered funding for higher levels of education detrimental to the goal of equality, primarily because of the reduced completion rates at the elementary level. In other words, putting more emphasis on higher levels when the elementary level has not been achieved could result in inequality for less privileged students. Other levels such as secondary education are not universal, but will have a new approach. Instead of seeing secondary education as only a preparation stage for the next level of education, it is now also seen as the final level of education that many achieve. This change of perspective is important because this is now the level at which students receive training to become workers (p. 21), which in the eyes of the government increases their opportunities to escape from poverty.

To produce better results and achieve the objectives of the project, long distance-education is a crucial technique (SEP, 1989, p. 10). A system that aspires to universalization probably lacks the infrastructure to serve the entire population of elementary education students. Long-distance education is an alternative and complements the school system (p. 24). This NPE broadly discusses long-distance education and systems of validation of informal education, although it does not present a detailed method for these systems.

Ernesto Zedillo: Education as a Strategic Factor of Development: The Birth of the Human Capital Approach in Mexican Policy Documents: 1994-2000

Inheriting a country with a collapsed economy and with an unconfident society, Zedillo's government was the final in a 65-year period of PRI control in Mexican politics. Zedillo became the president of Mexico after replacing the assassinated candidate Luis Donaldo Colosio; Donaldo's assassination (still unresolved) occurred while he was campaigning for the presidency (Castañeda, 2000, p. 112). Another event that increased the political upheaval at the beginning of Zedillo's term was the uprising of the Zapatista guerrilla. The Zapatistas protested (and continue to protest) the injustices of capitalism and made public their discontent with the neoliberal policies that Mexico was so openly adopting

(Purcell & Rubio, 1998, p. 1). Their guerrilla warfare brought international attention to the plight of the Mexican Indigenous groups, which highlighted the fact that their rights and their needs were ignored under a system that favoured capital and elite groups. In examining Zedillo's government, the literature reported that he overcame the financial crisis that he inherited thanks to international loans and investments that generated new employment opportunities. Zedillo continued the liberalization project that his predecessors had started, which gave rise to new and varied investments, extensive trade, and decentralization and privatization of public companies. In education there were no significant changes to the previous NPE. Given that he was the secretary of education during Salinas's term, he ensured the continuity of policies that he helped to design (Raphael, 2007, p. 101). But a significant change in his education project was the push for changes in the National University of Mexico's[37] student fees, which turned the university population (of this and other public universities within the country) against him and his economic agenda of 1997. Another important change during this period was the implementation of the Teachers' Raise program, which I discuss later.

Mentalities

Most of the arguments contained in this NPE were constructed around the need to improve the quality of the system. Quality was defined with a set of indicators, the most important being efficiency, equity, and student achievement (SEP, 1995, p. 18). Education was an important component of community life and was conceived as a "strategic factor of development, framed within the concept of human capital" (p. 2). The objectives of this national program were "equity, quality, relevance and coverage" (p. 3). Coverage meant that education opportunities had to be open to everybody regardless of their location or economic and social conditions. Consistent with the international discourse on development, the theme of sustainability in education was another element of the definition of better education (p. 5). Based on the argument that the government was listening to the demands of society, basic education received funding priority during this period (p. 6). It was referred to as the level at which individuals acquire skills to become independent learners and at which personal and social values indispensable for democracy, national sovereignty, and peaceful coexistence are acquired (p. 14).

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[37] The government has always funded the National University of Mexico. Throughout the 1990s the subsidy was questioned, and the government tried to introduce a series of student fees. Students protested and fought for continued "free university education" (de Garay-Castro, 2002).

Programs

Zedillo ensured the continuity of the Educational Modernization program that Salinas had begun. He used the National Agreement for the Modernization of Basic Education as a guide for the process of modernization (SEP, 1995, p. 12). The process of modernization was equated with the process of quality achievement. The most significant programs implemented during this period were the Teachers' Raise program, the Reading and Writing program (p. 23), and the

Schools of Quality program. PROGRESA continued to follow the same regulations and objectives as the previous presidential term had used.

Carrera Magisterial (the Teachers' Raise program) is a program of point accumulation that allocates monetary and promotion incentives to teachers on a meritocratic basis (Raphael, 2007, p. 95). It began in 1993 with the primary objective of encouraging the adoption of behaviours and reforms that were considered crucial to achieving quality. To ensure teachers' compliance, the government implemented a system of incentives that differentiated teachers' salary according to their performance. The incentives reward teachers' performance, knowledge of their subject, knowledge of policy, experience (years of teaching), educational level, and willingness upgrade their knowledge. This program is a powerful tool of change; nonetheless, it has generated a great deal of resistance and criticism primarily because it often undervalued aspects such as experience, which leaves older teachers disadvantaged in the competition with younger, more schooled teachers. As Table 5 shows, teachers receive fewer points for experience than for the rest of the criteria taken into consideration on the point scale. It has also worked as a mechanism of control to successfully introduce reforms with little objection because in their attempt to obtain more points, teachers have underestimated the scope and effects of the reforms. The criticisms, however, have been gradually fading as newer generations of teachers outnumber the older generations.

Table 5

Point System of Salary Incentives

Factors	1st facet: frontline teachers	2nd facet: support staff	3rd facet: administrative staff
Experience (years in the system)	10	10	10
Education level	15	15	15
Professional preparation (knowledge measured by exams)	28	28	28
Upgrading courses	17	17	17
Professional performance	10	10	10
Student performance	20	–	–
School performance	–	20	–
Educational support	–	–	20

Techniques

This NPE concentrated on improvement in quality rather than on expansion, which is reflected not only in the proposed programs and techniques, but also in the allocation of funding that prioritized quality and efficiency (p. 53). I later discuss some of the techniques that were thought to contribute to the project of quality improvement. The NPE touted reorganizing the system; setting up detailed methods, plans, and content; developing systems of information; and measuring and evaluating performance as crucial steps toward quality improvement (SEP, 1995, p. 18). Funding was identified as another key element, which became more rational (p. 5) because it rewarded activities and behaviours that would ensure the smooth adoption of reforms such as those discussed in the Teachers' Raise program. The NPE identified teachers as yet another key element and promoted activities to improve their performance. Teachers could now upgrade their training through special courses (p. 26) and newly established teacher centers that offer technical advice, computer training, and access to resources (p. 27). This national plan also identified students as the key players in the education process. It was very aware of the multidimensional nature of student needs (p. 37) and specifically mentioned and addressed the needs of immigrants (p. 39), street children (p. 41), and children with disabilities[38] (p. 47). For this reason it recommended the implementation of a flexible curriculum adapted to local and student population needs and the use of television, computers, and satellite technology (EDUSAT) to facilitate the provision of long-distance education.

Vicente Fox and His Agenda of Change: 2000-2006

2000 saw a new party in charge of Mexican politics for the first time in almost 70 years. Vicente Fox, from the conservative PAN, took control of the country with an agenda for change. The change, however, involved only the adoption of stronger neoliberal policies from which the broader population gained little. As with previous governments, Fox's gave priority to foreign investment, lower trade barriers, free trade policies, and privatization, which all benefited primarily the national elites, investors, and large-scale and foreign businesses, whereas poverty levels within the country increased (Benitez Loreto, 2008,

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[38] This national plan sets up the rules to integrate children with disabilities in the regular programs. The argument is that they need help to succeed at school.

p. 246). The following section analyzes the educational policies developed during this government.

Mentalities

This PNE was also the result of a consultation with professors, specialists, students, educational authorities, organizations (SEP, 2001, p. 11), researchers, analysts, parents, graduates, and representatives of the productive sector (p. 19). These actors wrote proposals that, according to the government, were later analyzed and incorporated into the final plan. The citizen consultation produced 8,235 proposals, and the Ministry of Education identified 11 main needs: student scholarships for elementary education, teacher training, adult education, technical and medium education, citizen values, sports, construction and maintenance of schools, popular culture, space for cultural activities, scientific and technical research, and universities (p. 20). The method used to extract and determine these needs from the consultation is not discussed, its democratic value is still in question.

Education faced three big challenges: coverage with equity, quality and integration, and the functioning of the educational system (SEP, 2001, p. 16). It aspired to shaping a participative, responsible, and critical citizen of solidarity, which, according to this NPE, were necessary characteristics for a democratic and modern society (p. 9). Some of the government objectives for education included

> a broad, equal, flexible, dynamic, articulate, diversified educational system that offers education for the integral development of the society; a system that is recognized by its national and international quality and that has effective mechanisms of participation from the society. (p. 11)

The objectives for education seem to point towards an increasingly economized, business-like system, as SEP pointed out, "with a better integration and a more efficient administration like the modern organizations that learn and adapt to the changing conditions" (p. 17). Another objective of education was to shape a society of knowledge and information (p. 35). term *society of knowledge* reflects the increasing pressure on everyone to acquire formal education and the naïve belief that information and experience are acquired only through formal institutions (Wolf, 2002); it actually reflects a philosophical reversal when one considers this NPE in the context of previous NPEs, such as that of Miguel de la Madrid that recognized the importance of informal education.

Education was associated with a high quality of life; the NPE stated that Mexico

> cannot aspire to build a country where everybody has the opportunity of having a high level of life if our population does not possess the education that allows it. . . . Education must be a fundamental axle and a central priority for the executive assembly. (SEP, 2001, p. 9)

Furthermore, the government's priority of education should be reflected in continuous and growing funding (p. 41).

Education was clearly related to poverty elimination, to which the NPE referred as "the determinant factor of the levels of national intelligence and the driving point of the national efforts against poverty and in favour of equity" (SEP, 2001, p. 17) and the thrust of the country's economic takeoff (p. 18). In its discussion on education and poverty, the NPE pointed out that the speed and the interconnectedness of the new economic model (globalization) has produced new and more severe factors that contribute to the vulnerability of the poor (p. 35). This is a brief but interesting point because it is the first time that an NPE viewed an economic problem such as poverty linked with the economic system and not only with education and the lack of it.

Programs

Several programs were developed to address the government's objectives for education during this period. Those designed to address poverty, inequality, or any economic condition that might inhibit students' ability to attend school or the school's inability to provide adequate education to poor students include the Schools of Quality Program (PEC), the Program to Eliminate the Backlog in Pre-school and Elementary Education (PAREIB), and the Program of Education, Health, and Nutrition (PROGRESA; SEP, 2001, p. 130).

The PEC operates under the belief that decentralization, planning, and evaluation are necessary to increase the quality of schools. This program uses a human-capital paradigm because it gives priority to marginalized schools in the belief that serious quality problems abound in these schools and that graduates from lower quality schools have fewer opportunities to excel in the labour market. This argument then justifies investment to ensure quality education in these schools. The participating schools must develop a project with the participation of the community, the parents, and all of the school actors; if it is approved, it receives funding from the federal government and the Ministry of Education (SEP, 2006). This funding operates as an incentive because it is additional and independent from the regular funding to operate schools, and it is a powerful tool for change because only those schools that are willing to implement the government changes receive funding.

The PAREIB was implemented from 1998 to 2006. This program attempted to solve the dropout and failure problems primarily of students in marginalized schools. It used a series of incentives that were allocated to schools that manage to implement strategic changes in their administration, school projects, and teacher training, which were identified as key areas in quality improvement. As the following quotation indicates, quality was identified as a factor that affects the possibility of success for children who attend marginalized schools: "An insufficient or a bad quality education—that produces failure or dropouts among the country's neediest populations—is a factor that instead of reducing equity reproduces it" (SEP, 2001, p. 108).

The PROGRESA, implemented in 1992, changed its name to Oportunidades Humanas (Human Opportunities) during this administration. This program continued to provide decentralized scholarships to families with children attending school. Combating poverty through education, health, and nutrition is its main objective, which is tightly linked to the human-capital approach to education.

Techniques

Private and public educations were redefined (SEP, 1998, p. 68), which I see as an attempt to make the population aware of and compliant with the responsibilities that the government set for them. According to this redefinition, public education is everybody's responsibility: "It is public because it belongs to everybody" (p. 47). The NPE pointed out that all types of education contribute to the success of the country (p. 47), and under such considerations citizens should support and foster both types of education and not view private education as competition or opposition to its public counterpart.

The NPE used the term *society of knowledge* abundantly throughout the document in an attempt to highlight the importance of lifelong learning (SEP, 1995, p. 221). This perspective on society strengthened the notion of human capital by highlighting that knowledge is constantly developing and that, to benefit (economically and culturally) from it, humans need to constantly educate themselves. Unlike traditional societies that also considered physical strength important to the economy, this society values the mental capacity of individuals above everything else. This approach raises an important question: Will manual/physical jobs cease to exist? If yes, who will do these jobs?

The NPE referred to financial mechanisms as a tool to directly allocate funds and help to improve educational services (SEP, 1995, p. 48). The document strongly encourages alternate forms of funding, with the argument that they will contribute to a "better distribution of the resources needed for the educational tasks" (p. 89). The plan considered international funding and presented strategies to attract and make better use of this funding (p. 93) and plans to increase the transparency and efficient use of resources (p. 94) to reach 8% of the NGI (National Gross Income) by 2006 in resources for education (p. 93).

Planning and evaluation, according to this NPE, should be linked. Rigorous methods of evaluation, information systems, and performance indicators were all part of the quality project proposed in this NPE, assisted by the creation of the National Institute of Educational Evaluation (SEP, 1995, p. 100). It had already deemed radical change in the administration processes as necessary (p. 83) and contended that decentralization should reach a point at which each individual school manages and administers its own affairs as part of this change (p. 85).

Summary and Analysis

In this study I have demonstrated that national policies, as did international policies, underwent a change that linked education with poverty alleviation in recent decades. Mexico's policies are different in two ways: First, the bank's policies have always depicted education in financial and utilitarian terms, whereas Mexico's policies became financially focused only at the end of the 1980s (SEP-PEF, 1984) with President de la Madrid; second, the bank linked education and poverty a decade earlier than Mexico did and published this link in the latter half of the 1970s (Brodersohn & Sanjurjo, 1976; Coombs & Ahmed, 1975). Aware of overlaps, in the following paragraphs I summarize the changes framed within blocks of time to show that, as the years passed, policy documents demonstrated a growing reliance on economic principles to define and practice education.

The NPEs from the 1970s emphasized the establishment of civics and ethics through education and claimed that education should be holistic and that policy endeavours had to consider the emotional needs of the learner (Echeverria Alvarez, 1974, p. 57). These documents aimed primarily at shaping "men and citizens" (p. 66), while at the same time acknowledging the economic value of education. Later documents endeavoured to shape workers (SEP, 1995, p. 18; SEP, 2001, p. 17), thus demonstrating a shift from a humanist perspective to one that was more economic and utilitarian in its scope.

The idea of progress through expansion and higher levels of education was very dominant during this decade. Issues of efficiency and equity had not been problematized, and this was perhaps why funding for higher education was not questioned as in the decades that followed. These governments relied upon the terms *progress* and *change* to justify the need to implement new policies (Echeverria Alvarez, 1974; López Portillo, 1976). Progressive policies of development that favoured change became relevant in education; old practices—rooted primarily in the traditional ways Indigenous to the various regions throughout the nation—were deemed obsolete, whereas the adoption of new, increasingly Western practices became popular (López Portillo, 1976, p. 1). Change in education was advocated for the sake of change, and it was deemed inevitable, which made education the object and the means of that change (p. 4) and diminished any possibility of resistance. No reference to poverty alleviation was significant enough to indicate that education was drifting in this direction.

During the 1980s the idea of change continued to persist; however, unlike in the previous decade, the NPEs in this decade laid out more systematic plans to achieve the heralded change. Change had a tone of improvement, but in reality it was more about adapting to what was being perceived as a problem than about creating possible and necessary solutions with local relevance. In this decade changes were implemented to increase efficiency, improve access to marginalized populations (SEP-PEF, 1984, p. 29), and bring the system of education up to date according to Westernized standards (p. 29). These changes were in part a response to the financial crises that occurred not only in Mexico, but also worldwide. Whereas previous education policies had concentrated on expanding the system, expansion was secondary for the NPEs at the end of the 1980s. Instead, in de la Madrid's and Salinas's terms, education funding dominated political discourse (SEP, 1989, p. 14; SEP-PEF, 1984, p. 29). Under these circumstances, policies for the efficiency, planning, budgeting, and methods of long-distance education and accreditation of informal education entered the stage (SEP, 1989, p. 30; SEP-PEF, 1984, p. 69). The way that they were presented clearly fit within Western rationality, which means that the country adopted the values and practices that were dominant in developed countries (Peet, 2007; Rwomire, 1998, p. 19). One example of this is the adoption of efficiency as a goal and practice of education, which to that point was not a commonly held value in Mexican society, where the value of work mattered more than the speed with which the work was done (Fischman, Ball, & Gvirtz, 2003, p. 5; Rodríguez-Gómez & Alcántara, 2003, p. 15). This carried over to education. As these changes affected the definition of education, not only efficiency but also quality, cost benefit, and funding matters took priority over issues such as system expansion and class delivery.

Education, however, continued to be seen as a process to shape the individual. This decade reprised the holistic aspect of education by emphasizing the mind as well as the body and spirit (SEP-PEF, 1984). The NPE designed during de la Madrid's term defined education as a powerful tool to shape the future of Mexico, while also making clear that it was not the panacea for all of society's problems (p. 10). Education was just one factor with the potential to contribute to the betterment of society, and it was not yet clearly associated with economic matters.

The 1990s were characterized by the implementation of neoliberal policies in educational practice. Everything, from the mentalities to the programs to the techniques, reflected the adoption of a new paradigm in which the economic aspect took center stage in educational practices. NAFTA and Mexico's membership in the OECD were determining factors in Mexico's adoption of neoliberal policies, and Salinas's government implemented a program of education based on a modernist ideology (Loyo Brambila, 1999, p. 52). Free, centralized, state-funded, public, and inflexible education was described as backwards and antiquated. Modernizing the system consisted of decentralizing education, making the public bear its costs and responsibility for some managerial aspects, encouraging new and more private institutions of education, and adopting financial mechanisms such as incentive programs for teachers and students (SEP, 1989, p. 14; SEP, 1995, p. 18). The banks' policy documents also encouraged the policy of decentralization during this decade (IDB, 1994, p. 11; IDB, 1997, p. 3; WB, 1998, p. 4).

In the financial field, highly rationalized accountability techniques became paramount in allocating and distributing funds. Education during this decade became unquestionably connected to the economy, not only through the adoption of more economic practices to manage it, but also through the assumption that it was one of the panaceas for social problems—poverty was one of the most important—as Salinas's NEP described it (SEP, 1989, p. i). To address poverty through education, PROGRESA was introduced as the government program in charge of funding education and some of the food and health expenses of families with schooled children. This program was intended to eliminate any possible barriers to attendance under the principle that children who drop out have fewer opportunities to succeed in life. This principle is valid considering that these children will have to live in a society designed to value and reward only individuals with education and the documents to prove it.

During the first decade of the 21st century, with the appointment of a new conservative government, the argument on education and poverty became even stronger. Elementary education has been presented as the means to train workers;

higher education, although important, did not qualify as a government objective. In my reading of the NPEs, I noted that this government ensured the continuity of the highly economized paradigm of education that the previous government had established. More privatization, more incentive programs, more techniques to measure performance, and more funds to achieve higher student completion rates were all part of Fox's plan for education. Education was depicted as a contribution to "an integral development of society" (SEP, 2001, p. 11).

This government also greatly emphasized the formality of education, which means that institutionalized forms of education gained further legitimacy. This is seen not only in the equation of education with schooling, but also in the arguments in favour of lifelong learning. This means that people are encouraged to learn constantly and to do it in a formal institution. The notion of human capital appeared at the end of the 1990s in Mexican educational policies and has been further emphasized in the current decade, when education is referred as the "driving point of the national efforts against poverty and equity" (SEP, 2001, p. 17).

Conclusion

In this chapter I have shown that the current definition of education in Mexico has changed in government policy documents. After exhaustively reviewing six key policy documents, I have concluded that the national approach to education changed from a perspective on education as the means to shape students into human beings who are able to use their full capacities and human potential to a perspective on education as the means to train workers who are able to meet their individual economic needs and contribute to the economic development of their nation.

Scholars in the field of policy analysis have pointed out that policies are made in an attempt to address or solve perceived problems. They have suggested that this perception is not neutral; rather, it is influenced by the interests of key players (Pal, 2005; Westen, 2007).It is worth noting that for more than two decades politicians have tried to solve economic problems with educational solutions. This perspective overlooks the multifaceted nature of societies and economics and the possible external factors that can also influence poverty rates. The WB databases on poverty, for example, show that poverty levels over time, excluding China, have remained almost the same. In the case of Latin America and the Caribbean, poverty has neither increased nor decreased from 1981 to 2001 by a statistically significant amount (Table 6).

Table 6

Poverty Levels Over Time in Latin America and the Caribbean

1981	1984	1987	1990	1993	1996	1999	2001
Number of people (in millions) and proportion (%) who lived on less than $1 a day in Latin America and Caribbean							
36	46	45	49	52	52	54	50
9.7%	11.8%	10.9%	11.3%	11.3%	10.7%	10.5%	9.5%
Number of people (in millions) and proportion (%) who lived on less than $2 a day in Latin America and Caribbean							
99	149	115	125	136	117	127	128
26.9%	30.4%	27.8%	28.4%	29.5%	24.1%	25.1%	24.5%

(WB, 2005b)

Education enrolment, on the other hand, has increased. According to the WB's (2009b) figures, the global secondary gross enrolment rate improved almost 60%, from 41% in 1985 to 65% in 2006. In Latin America and the Caribbean this percentage, in fact, almost doubled, from 46.9% in 1985 to 89.4% in 2006 (WB, 2009b).

If these numbers are true, the idea that education is solving poverty is neither honest nor valid because, as the statistics demonstrate, poverty levels have remained almost the same, whereas the rate of education has almost doubled in the same region. If education is indeed the solution to poverty, as education rates rise, poverty rates should drop at the same rate. The perspective on education as the panacea for poverty also ignores the fact that for years nations have functioned without awarding diplomas and without broadly accessible mass systems of formal education. It is interesting that the goal of poverty reduction has become so popular with institutions that favour unrestricted capitalism as a method to accumulate wealth, but surprising to discover that some documents even referred to this goal as poverty *elimination*; this is no doubt a laudable goal. The problem arises when this problematization focused primarily on poverty itself and on empowering the poor by allowing them to participate in the acquisition of capitals such as education. I define this as a problem because I believe that we should also focus on the rich and on the means that they use to accumulate wealth. If we want to reduce poverty, we should assess the accumulation of capital in the hands of fewer people, and the goal of poverty reduction should also take into consideration wealth reduction. I will expand on this argument in the following chapter.

Another perspective that has changed within education is the emphasis on quality and efficiency, which seem to be the favourite terms in more recent policy documents. But what is remarkable is not the use of the terms, but the means proposed to achieve quality and efficiency. First, they are now intimately linked, which means that good-quality education occurs when personnel are able to achieve 'more with less,' especially with fewer government resources. The reduction of government resources has been achieved through a more rationalized system, as the analysis has shown.

The changes described above, although unique in their timing and in the way that they have been presented to society, coincide significantly with the policies proposed by the banks. First, the increasing rationalization of resource allocation followed the same method and rationale as those of the banks. That is, allocation was based on a meritocracy that valued efficiency, quality, accountability, and sound administration. The level of rationalization for resource allocation and administration of the system is radically different in later decades, which indicates not only the maturity of the formal education system as we know it, but also a stronger link between administration and education, as the banks advised. Second, the emphasis on elementary education, on the premise that this level should receive priority until full participation and completion are achieved, also resonates with the banks' recommendations outlined in the plan to universalize elementary education goals. Third, the definition of education as a sector of society with development potential and the potential to solve individual poverty first appeared in the bank documents in the 1980s; a decade later it appeared in the policy discourse of the national documents that I have analyzed. These three factors indicate a clear influence of international financial institutions at the national level, at least with regard to policy formation.

Lidia Henales and Beatrice Edwards (2000) emphasized that education will not solve poverty or the social and economic problems that banks and national governments claim that it does, and I concur:

> However, we argue that education, even if reformed in the most effective and generous manner possible, cannot generate employment, eliminate or even mitigate unequal income distribution, oblige private and public capital to make responsible long-term investments, repair the social fabric, or reduce violence. (p. 124)

This perspective on education, however, is not all negative because education has received more attention and more funding in certain countries, and some children who had no hope of becoming literate have been given a chance to go to school. Nonetheless, the novelty of these results will not end poverty.

CHAPTER 5:

CONCLUSIONS AND RECOMMENDATIONS

I have examined the publications of the WB and the IDB and the policies of the Mexican national government that arose over the course of five decades. What is the end result of this examination? Have I answered the following research questions?

1. Since the 1960s, how have the WB, the IDB, and Mexico approached the notions of education and poverty?
2. How and when did the notions of education become linked with the notions of poverty in the education policy documents of the WB, the IDB, and Mexico?
3. Have these links changed over time?
4. Do the international and national approaches to education for prosperity concur?

In this chapter I begin with a summary of my analysis of policy documents. Next, I synthesize my findings. Finally, I present a more extensive discussion of my findings, organized in four themes that I identified as I reread the conclusions for each study with the research questions and theory in mind.

Summary of Findings

The foregoing examinations of policy documents for the last five decades indicates that at an international level the definitions of and approaches to education have indeed changed, if not in substance, at least on the surface. The notion of using education to combat poverty appeared recently in policy documents—at the end of the 1980s . However, the perspective on education as an investment—another side of the human capital theory—has remained a constant characteristic of all of the banks' documents. The new conceptual approach was then not about investing in education, but about the objectives of that investment. Earlier documents (from 1960 to 1970) emphasized that education was an investment for the nation, whereas the latest documents (from the late 1980s to the present time) have stressed that it is primarily an investment for the individual who obtains education, and then for the nation.

I showed that, gradually, international policies for education have adapted to an economic system that prioritizes efficiency and economic values. I believe that the individualizing techniques demonstrated a significant turning point in the adoption of the notion of education for prosperity. As I see it, focusing on the individual was a technique that eased the establishment of poverty-reduction policies. In other words, by shifting the political focus from the national to individual benefits, the policy became more about poverty alleviation and economic values.

I also saw a flow of policies and ideas in the publications from bank officials to the PADs designed by representatives of the country, with technical support from the bank officials. According to the characteristics of the publications and the PADs, the PADs seemed to follow a template or pattern that had been predesigned in the publications. This pattern of ideas that began with the publications and spread to the PADs a few years later is consistent throughout the documents that I reviewed, which partially shows that the publications contained theories that the PADs converted into practice approximately a decade later. The publications were research documents on reform theory and prescriptions for worldwide application. The PADs were attempts to address the needs of a specific country, in collaboration with its representatives, to solve local problems. Finally, besides the broader emphasis on poverty reduction and the focus on the individual as the primary benefactor of education policies that were apparent in later policy documents, it was evident that the banks consolidated their reputation as expert banks that were willing to act socially responsibly.

At a national level I showed that Mexico's current definition of education has changed in government policy documents. The national approach to education changed from a perspective on education in documents from the 1970s to the 1980s as the means to shape students into human beings who would be able to use their full capacities and human potential, to a perspective on education in documents from the 1990s to the present time as the means to train workers who would be able to meet their individual economic needs and contribute to the economic development of their nation.

Another side of the change in the approach to education in Mexico showed a notable emphasis on quality and efficiency, which seemed to be the favourite terms in more recent policy documents that justify changes in the approach to education. Increasing rationalization of resource allocation was also outstanding and followed a similar rationale as those by the Banks. That is allocation was based on a meritocracy that valued efficiency, quality, accountability and sound administration. The level of rationalization for resource allocation and for administration of the system was radically different in later years (1990s to present) indicating a stronger link between administration and education, as the Banks advised. Also, the emphasis on elementary education, arguing that this level should be given priority until full participation and completion was achieved, also resonated with the Banks' recommendations outlined in the universalization of elementary education goals. Finally, the definition of education as a sector of society with developmental potential and with the potential to solve individual poverty first appeared in the Bank documents in the 1980s, a decade later it appeared in the policy discourse of the national documents analyzed in this research. All of these pointing towards a clear influence of international financial institutions in the national level, at least at the policy formation level.

Synthesis

To wrap up my findings then, I have found that at an international level the perspective on education for prosperity changed to the adoption of a poverty approach, but remained the same in its financial approach. The banks' perspective on education has always been in monetary terms, but their emphasis entered policy discourse in the 1980s and changed from the viewpoint that nations benefit from education to the perspective that individuals benefit first, and then their nations. At the national level, the view of education changed at the end of the 1980s and throughout the 1990s, when the perspective on education suffered a more substantial change that was financial in focus, because older documents had portrayed education as a shared social asset and as the means to achieve human realization. More recent documents have portrayed it as the means to achieve economic stability, as a filter through which to reduce access to jobs, and as the guarantor of a better quality of life for the individual.

Dominant Themes in Each Study Contrasted With the Research Questions and Theory

In my examination of the policy documents for this research and the resulting analysis, and in comparing them with the research questions and the theory, I identified four dominant themes that are related to each other as well as to the main questions. A discussion of each follows.

International and National Perspectives Back to Back

Compared to the international analysis, the national policies for education in Mexico were timed differently in terms of their adoption of the education for prosperity paradigm. The first study showed that international banks have indeed advocated for an economic approach to education since the beginning of their intervention in this sector at the end of the 1960s; Mexico did not even begin to discuss the human capital approach until the end of the 1980s. The banks' economic approach was evident in earlier policy documents but did not materialize in loan agreements until the 1980s. The loan agreement with

Guatemala defined education as "a prerequisite for overcoming the economic, cultural and social constraints of the marginal urban and rural poor" (WB, 1983, p. 10). Despite the banks' early attempts to materialize the economic approach developed at the end of the 1960s in the education projects, they were unable to diffuse this perspective into national policies until the 1980s, as is evident in the projects in Guatemala (WB, 1983), Peru (WB, 1984), and Brazil (IDB, 1989). As I explained earlier, a central turning point for the banks was their implementation of their individualizing techniques. Focusing on the individual rather than the nation constituted a natural transition to the policies that viewed education as a tool to combat poverty. Additionally, political events such as the oil crisis of the 1970s and the legitimacy crises that the banks faced in the 1990s contributed to the development of the perspective of poverty reduction through education (Resnik, 2006, p. 195).

In my interpretation, the adoption of the human capital approach highlights four aspects: (a) the power of the financial and technical mechanisms in the loans, (b) the role of the banks as globalization agents (Neu, Ocampo Gomez, et al., 2002), (c) the role of each individual country in supporting this approach; and (d) the political potential to address such a 'benevolent' cause as poverty reduction or elimination. Regarding the first and second aspects, I would like to point out that although the WB and the IDB were created in the 1950s, their work in and influence on education was reduced to diagnosis and general analysis until they began to lend money through. Loan agreements for specific projects did not start until the end of the 1970s and did not begin to diffuse the banks' ideas until the 1980s. In the 1980s the notion of human capital was evident in a significant number of projects, and by the 1990s it became the driving force of all educational policies and projects. Based on these observations, I posit that the banks have contributed to the diffusion of the education for prosperity paradigm, although the origin of this idea could have been multidirectional, resulting from the influence of different actors at different levels. As I explained in the introduction, policy formation does not occur unilaterally, but as a result of multidirectional influence from varied actors (Howlett & Ramesh, 2003, p. 54; Taylor et al., 1997).

Regarding the third and four aspects, the role of the individual countries and the political potential to address poverty and education, I contend that this perspective of education has been opportune for national leaders. Although the banks certainly played a crucial role by fostering a specific mentality of education for development and by constituting a field of discourse (Foucault, 1996a, p. 40; Resnik, 2006, p. 180), national leaders have supported this discourse because it is to their advantage to do so. In the midst of corrupt practices, the discourse on education and its importance has played the role of an easy scapegoat that has helped politicians to gain legitimacy nationally and internationally. Nationally, by emphasizing education, they have been able to distract the public from the real reasons for poverty and because education is a unanimously valued service that few will oppose (Hanales & Edwards, 2000, p. 124). Indeed, speaking out against education or against poverty reduction has become a sort of latterday heresy that none dare commit. Internationally, the discourse on education enabled politicians to attract funds for education that made the governments appear to be acting socially responsibly or in line with society's interests by investing in a sector that everyone values (Resnik, 2006, p. 174). This, of course, has solved short-term educational needs while creating long-term problems and, because most of the funds for educational projects of this type come from international banks, increasing national debt.

Enhancing the Economic side of Education

Apollo Rwomire (1998) raised an important question: "Why has education become such a big business?" (p. 3). Throughout this research I have shown that education is practiced in monetary terms because it is conceived in monetary terms. Julia Resnik (2006) called this economic perspective on education the "education-economic growth black box" (p. 179) to indicate that it has become an unquestioned perspective. It is "knowledge that is accepted and used on a regular basis as an unquestioned matter of fact" (p. 179). This knowledge is transforming the way that education policies are formulated, "based on planning according to economic needs" (p. 191), not according to social needs.

The human capital theory, as I indicated in chapter one, became relevant in policy formulation during the 1950s with the work of Gary Becker. He stressed the idea that knowledge and skills contribute to productivity and thus considered them a type of capital with benefits to the holder as well as to the group of people to which the holder belongs. Under this perspective educational policies changed to a more utilitarian mode, whereupon the process of education has, in political discourse, been presented as an investment for the nation and for the individual. This investment supposedly helps to solve not only economic problems, but also a series of social problems associated with the lack of formal education: poverty, AIDS, violence, crime, drug use, and ethnic conflicts, among others.

During the last four decades education as the panacea for social and economic problems has without a doubt become a dominant discourse in international and national realms. Considering that, despite the efforts to adopt this perspective on education, poverty and other social and economic problems have persisted, different authors (including myself) have stressed the need to question the underlying forces behind this perspective on education to study the consequences and evaluate whether a change of paradigm is necessary (Bourdieu & Passeron, 1990; Henales & Edwards, 2000; Wolf, 2002).

This research emphasized three aspects: (a) that the human capital theory has been the ideological basis of the policy changes that occurred during the last decades, (b) that the banks have been justifying its implementation since the 1960s, and (c) that there is increasing reliance on the premises of this theory as the trajectory of the international and national levels reveals. Such reliance has transformed the mentalities, mechanisms, and technologies used to address education, and this transformation needs to be kept under scrutiny for us to be able to evaluate whether our society is actually benefiting from it.

School for Wealth: Education as the Panacea for Poverty

Individuals attend school to be able to access better-paying or more prestigious jobs; this well-known ideology has raised significant discussion. The same can be said about the emphasis on the discourses on education for development that governments worldwide have promoted. Education has almost ceased to be about learning so much as it is about earning a degree or diploma for the economic benefit of the individual and, consequently, the nation. For the most part, the know-how aspect of schooling has become secondary. The idea of educating oneself or obtaining a degree to contribute to society's moral, social, and cultural goals has also gradually eroded. Popular and official discourses too have argued that education is the means either to obtain a well-remunerated job or to achieve social mobility for the individual and the nation—with social mobility understood as the process of upgrading the individual's and the nation's economic status. Alison Wolf (2002) explained this by pointing out that "in this process, we have almost forgotten that education ever had any purpose other than to promote growth" (p. vii). The economic value of education for individuals is taken for granted and is further reinforced by the fact that most employers' requirements will indeed include school years to fill vacancies that in previous epochs did not require any type of formal education (p. 185). The emphasis on and faith in education should not, however, disguise the fact that it is a social construct that at a certain time both employers and employees structured, accepted, and reproduced (Bourdieu & Passeron, 1990, p. 55).

Considering education as a social construct raises a fundamental and somewhat philosophical question: Why? A full response to this question is the theme of another opus, but I will briefly analyze the question in this concluding chapter. Understanding a social construct requires some understanding of the social and institutional perspective towards a situation that is perceived as a problem. The perception of problems changes according to, among other things, the dominant discourses of the time, the interests of influential actors, and the role and perception of the groups and individuals who are affected by them (Pal, 2005, Westen, 2007; Taylor et al., 1997). The school institution gained popularity during the Industrial Revolution and the subsequent spread of modern economic growth that gave rise to urbanization, a middle class, and a change in gender roles. This change in roles, according to Jeffrey Sachs (2005), implied "social mobility, changing family structure and increasing specialization" (p. 38). As a result, women integrated into the labour market and transferred the care and rearing of their children to specialists and to school institutions (p. 39). Families stopped being the primary source of training for children. Parents surrendered the civic and vocational formation of their children to formal institutions of learning (Mitch, 1999, p. 244). Education also became important and necessary during industrialization because it prepared "efficient and effective workers for the factory assembly line" (Moll, 1998, p. 360).

In the context of the cases that I have studied in this thesis, education was originally a privilege that only wealthy families could afford, but in the last four decades it has become a political project aimed at the masses. It has become a natural, necessary project. Sending children to school institutions has allowed both parents the freedom to work and the capacity to further develop other areas of their lives. It has allowed children to broaden their knowledge base and enrich the knowledge of their parents with the experience and perspectives of their teachers, who nowadays specialize in particular areas, which affords them an expertise that parents or guardians cannot often easily attain. This process of education became more complex when the knowledge acquired at school was linked with job possibilities for the student.

In Western societies it is now seen as natural for individuals to attend formal institutions of education, but not so much in poor societies where women are still almost entirely in charge of their children's education. However, regardless of how natural this procedure may appear, we have to remember that it is the result of our design and that it was reproduced because we have validated it, approved it, and allowed it. We have to continuously question the basis of this procedure, as Bourdieu (1990) pointed out: "The regularities inherent in an arbitrary condition tend to appear as necessary, even natural, since they are the basis of the schemes of perception and appreciation through which they are apprehended" (p. 53).

International institutions seem to be manipulating the perception of formal education in the societies and economies of underdeveloped and developing nations as a professional and civic necessity. The "Education for All" policies are doing precisely this, based upon the assumption that the communities and individuals whom these policies impact need Western-style education. Webb, Schirato & Danaher (2002) highlighted that, "in contemporary societies, it would be unthinkable for education to be taken out of the hands of the schools and education bureaucracies and given back wholly to the parents" (p. 119). This is not what I am advocating with this study. What I want to emphasize is that all of the stages through which education has passed, from its unstructured organic nascence to the present day when it is associated with poverty elimination and economic development, are the result of human constructs and attempts to solve problems perceived by a specific society at a specific time. It is important to keep this in mind because when we see education as a natural process instead of as a human construct, we lose the capacity to continually question it and to look for alternative methods of conceiving and delivering it.

Ending Poverty Through Education: Does That Mean That Lack of Education Created Poverty?

Education as the mythical silver bullet that will eternally dispatch poverty is an attractive idea. But what makes it so attractive? And, more important, if policies are created by influential groups, what do they gain from this approach? Why has this discourse gained so much legitimacy, and what are its consequences?

To begin, I want to point out that the word *poverty* as it is now understood is relatively new; it refers to individuals with different but limited levels of possibilities to meet their needs. Scholars engaged with the topic of poverty have noted that poverty and its causes are increasingly related to global factors that often stand outside the individual's control. In his study on poverty, Beaudoin (2007) illustrated this point:

> Choosing globalization enhances or understanding of both poverty and world history itself precisely because poverty has been so closely tied to the process of globalization. Throughout much of the world before 1500 poverty resulted principally from local sources like natural disaster, warfare, and civilization-specific systems of distribution; few were affected by what were still regional trade networks. At the same time, most cultures viewed impoverishment as a natural part of life, rarely defined as the absence of material possessions. (p. 12)

This quotation highlights not only the transcendence of the current causes of poverty, but also the fact that poverty as a condition has existed for a long time, even if the actual term poverty has not. The same can be said about education. Although education nowadays is an institutionalized method of training individuals to perform activities for life and work, education as the method of transferring knowledge is also an ancient practice. However, the state as an active player in the development of strategies to reduce poverty and in the design and administration of educational institutions is a more recent approach (Torres & Puiggros, 1995; Whitty, Power & Halpin, 1998). In addition, the link between poverty and education, supported by the State, is new.

The state's involvement, together with the involvement of numerous NGOs in the fields of poverty and education, has resulted in, among other things, their institutionalization. By institutionalization I mean a formally structured and centrally administered bureaucracy (Bourdieu & Passeron, 1990, p. 56). This institutionalization has implied responsibilities and advantages for the state, but many of these responsibilities have become burdensome to the state, especially financially; therefore, it has attempted to transfer the responsibilities to other players, as recent discourses on decentralization have shown. But in other areas state involvement has been quite beneficial, which grants it better control and management of the populations (Knuttila & Kubik, 2000, p. 155).

I posit in this thesis that the theory of education as the panacea for poverty has become a political tool that sadly has facilitated the acceptance of techniques of selection. The formula that accumulating higher levels of education equals obtaining a better job and aspiring to a better quality of life is widely accepted. At the same time, this formula has worked as a tool to make poverty the fault of the poor and to distance it from political and or economic causes. Jeffrey Sachs (2005) contributed to this explanation by pointing out that "the most common explanation for why countries fail to achieve economic growth often focuses on the faults of the poor: poverty is a result of corrupt leadership and retrograde cultures that impede modern development" (p. 56). Our ability to question this notion of education will, I hope, help us to resist and remodel it and, by doing so, remove the stain of imperialism that currently pervades it.

Recommendations

Education is overvalued in an environment in which it is a prerequisite to ensure future economic well-being. But we have to realize that this expectations are politically and socially designed. Webb et al. (2002) contended that

> to view education as a principal means for alleviating social disadvantage, however, has meant that formal education qualifications tend to be highly valued within more and more fields. It is difficult to succeed in many fields without the cultural capital such qualifications provide. (p. 111)

This mentality has a series of consequences such as credential inflation, and for those who have to delay their participation in the labour market to attend school, this can actually cause poverty. Student loans and economic support from their families mean that students have to pay for their education even after graduating, which adds an extra economic burden. Also, if nations with a restricted economy and a restricted budget for public services begin to invest in education more than in other sectors, they may be at risk of further impoverishment. This is especially true when credential inflation relegates overeducated individuals to jobs that do not require as much education and training as they have, which converts the investment in education into a loss and frustrates the individual, especially if the perspective on the investment is reduced to monetary terms.

I am not suggesting that formal education disappear or lose funding. What I want to highlight through this analysis is that the education-poverty theory may be producing results that contradict its objectives. It is important to keep in mind the side effects of this political discourse; Julia Resnik (2006) highlighted some of them: "National leaders adopted the new education-economic growth discourse, which afforded new states access to international aid" (p. 174). This international aid attracted funds, but also increased the indebtedness and dependency of poor countries.

I propose that we begin by distancing the field of education from the field of finance, not because they are unrelated, but because the financial emphasis on education has been more damaging than beneficial. Poverty, looked at from a macro or a micro perspective, is predominantly an economic predicament. It is true that political and social aspects overlap with it, but it is primarily a financial circumstance. As such, we should demand that our governments address poverty primarily with financial solutions. Similarly, we should not let political discourse use education as the scapegoat for poverty or national leaders use the discourse of education for prosperity as a tool to fund their mandates.

As educators we have the responsibility to emphasize the other values and the potentials of education: as a humanizing and emancipatory tool, as a developer of the learner's potential and creativity, as a space where analytical and philosophical skills are cultivated and enhanced, and—to use Pedro Noguera's description in Carlos Torres's (2009) book—as the means "to humanize the learner so that each individual can function as subjects capable of creating and shaping their own history, rather than passively accepting their position as workers, soldiers, consumers, and victims on the world stage" (p. x).

We also have the obligation to demand a similar type of respect for these values as the respect that the economic value has managed to achieve. In doing so, we will diminish the pervasive influence that neoliberal capitalism has managed to exert in the field of education; the influence seen in the use of education as a way to rank, classify, stratify, reproduce, and dispose of individuals. We may also change the attitude and mentality of students and parents and their reasoning for going to school by making it a more significant and enjoyable task that helps them to see the more human side of education.

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